

Alexandria

Version 6

Basic Teacher's Manual

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i Preparation

A. Read the entire teacher's manual before training and PRACTICE, PRACTICE, PRACTICE the presentation beforehand.

Your attendees will appreciate the training more if you are prepared and know your material thoroughly.

B. Arrange a date and time.

Normally training will last 7 hours, but should be scheduled for approximately 8 1/2 hours to allow for two 15-minute breaks and a one-hour lunch.

C. Verify the number of attendees.

The best training is usually done in small groups, generally 12 people or less per session. If more than 12 people are to be trained, either divide the users by ability and perform multiple sessions or match new users with advanced users who can help them master the basics and stay on task.

D. Arrange a location.

Ideally, training will be done in a lab or library with enough computers for only 1-2 people per computer. Make sure that you and the attendees know how to get to the training site. If driving to the training site, ask beforehand about parking to ensure that you park in a reasonable location that will not require leaving class to attend to parking meters or to move your vehicle.

E. Verify that the computers meet the minimum requirements.

F. Install the demo on the computers before the attendees arrive.

Be sure to arrive with sufficient time to install. It will generally take 30 minutes to install on 12 machines. If you will be installing the demo personally, verify that no security software will prevent installation or ask that someone with the appropriate security clearance be in attendance to disable the security. If necessary, send the demo ahead and have a technician or a librarian install before you arrive.

G. Prepare and provide sufficient materials for each attendee.

Each attendee should receive a training manual and a circulation commands sheet (with command barcodes). Optional: an evaluation form and the trainer's business card.

H. Provide either name tents or name tags for attendees.

Name tags or name tents are very beneficial for the trainer and the attendees to learn each other's names. Name tents are made by folding a piece of paper in thirds; the attendees should write their names on two sides of the paper and stand the tent on the computer monitor.

1 Introduction

Estimated teaching time: 1/2 hour

A. Introductions -- Trainer and Attendees

B. Training Outline and Manual

C. Safe Seven

Table 1:

	Single-User	Multi-DataStation	Central Union	Hosted
Backup	Librarian	Controller Manager	Person in Charge	Host Staff
Archive	Librarian	Librarian	Person in Charge	Host Staff***
System Maintenance	Librarian	Techs	Techs	Host Staff
Alex Maintenance	Librarian	Librarian	Person in Charge	Host Staff***
UPS	Librarian	Controller Manager	Person in Charge	Host Staff
Security	Librarian	Librarian	Librarian or Person in Charge	Librarian or Person in Charge
Always Watch Your Screen	Library Staff	Library Staff	Library Staff	Library Staff
Call Tech Support	Library Staff	Library Staff	Library Staff	Library Staff

*** May be changed by Librarian; however, suggest that these be left as set by Host Staff.

1. BACK UP, BACK UP, BACKUP

COMPanion recommends that you keep **a minimum of NINE backups** at any given time. Backups are saving complete copies of your Data folder to some external medium be it on CD-ROM, an external hard drive, a flash drive or a file server. You should keep at least one backup per day of the week, plus four previous Fridays. We never discourage customers from keeping additional backups. If you are using the same drive to store all the backups, remember to rename the Data folder to include the date (i.e. 04092009Data, 04102009Data).

You do not need to back up the software. COMPanion can quickly replace the software if your library is current on its subscription. What COMPanion cannot replace is your data — so BACK IT UP!

It is strongly recommended that at least one copy of your data be stored off-site (e.g. take the Friday backup home). Libraries have been burglarized and all computer equipment including the backup discs have been stolen. Libraries have also burned down and the backups have been instrumental in obtaining a quick and settlement from the insurance company.

Central Union Systems: Only one person needs to do the backup.

Alexandria Controller Systems: This can only be done by a person with administrative rights to Alexandria Controller, so individual librarians will not be able to perform this function.

2. Perform standard machine maintenance.

Ideally, every machine should be scanned each month for viruses and for file damage. Run either Norton Disk Doctor (Macintosh) or Scandisk (PC) on a frequent basis. On Windows, Defragmentation of the hard drive should also be done regularly. Alexandria cannot be expected to run correctly when the operating system or file structure is damaged.

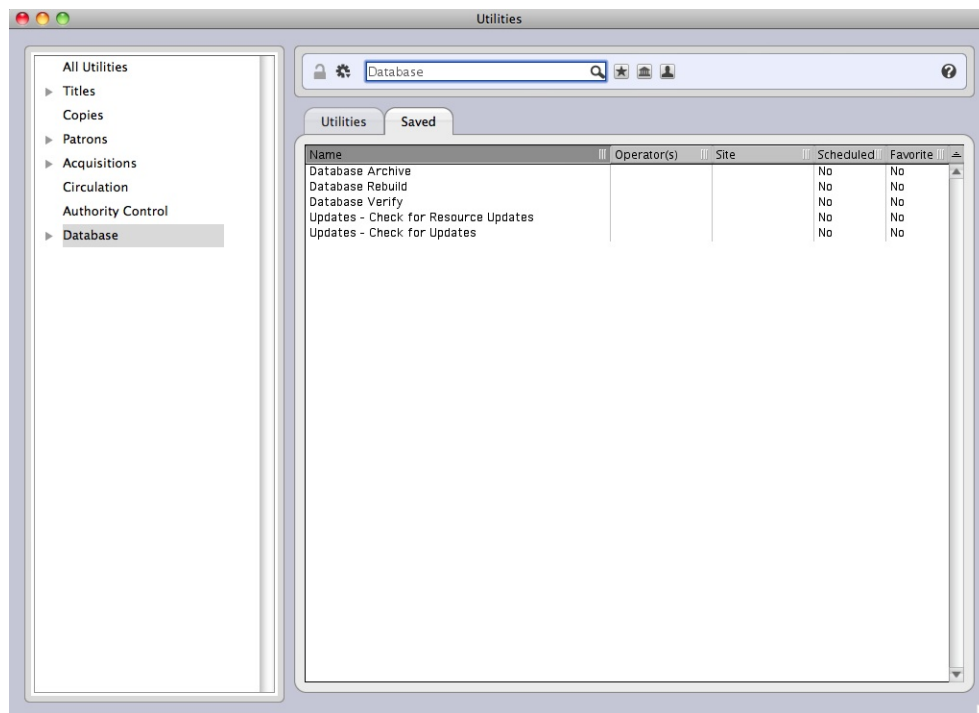
3. Perform Alexandria maintenance.

Twice month you should run **Rebuild** on your Database which can take several hours to run depending on the strength of your machine and the size of your collection. **Rebuild** checks that the indexes used for sorting, browsing, and selecting match the data, that the records are keyworded appropriately, and that the status counters are correct. Always archive before running Rebuild or any other major utility or import. Rule of thumb: If it might take longer to correct a problem caused by a bad import or running a utility incorrectly than it will take to run an **Archive**, you should archive your data before performing the **Rebuild** or import.

Alexandria Controller Systems: Scheduling a **Rebuild** can only be done by a person with administrative rights to **Alexandria Controller**; however, there is a **Rebuild Now** feature available under **File** on the menu bar.

Central Union Systems: **Rebuild** should be done once a week.

NOTE: Alexandria's Data Station must be running for **Rebuild** to be run.



To set up scheduled Rebuilds:

- Click on **Tools** on the menu bar and select **Utilities**.
- Click on **Database** in the left frame and, then, click on the **Saved** tab in the main (right) frame.
- Click on **Database Rebuild**.
- Click on the **Schedule** tab.
- Click on the **Calendar** icon in the **Run next on** field and select a date. It is suggested that you set it for a Friday. Next, set the time of day for a time when no one is likely to be using Alexandria. Change the **Repeat** drop-down menu to **Weekly** and click on **Friday**. Set the **Every** field to the value suggested for your type of system. (Stand-alone -- 4, Central Union -- 1, and Alexandria Controller -- 2).
- If you wish to be notified when a **Rebuild** is run, check the box and fill in your email address in the **Send Email Notification To** field. Check the box for **Perform Archive Before Running Operation**.
- Click on **Save All** in the upper-right corner of the window.

NOTE: You might want to set your **Archive** schedule while you are in **Utilities**.

To set up scheduled Archives:

- Click on **Tools** on the menu bar and select **Utilities**.
- Click on **Database** in the left frame, then, click on the **Saved** tab in the main (right) frame.

- Click on **Database** in the left frame and, then, click on the **Saved** tab in the main (right) frame.
- Click on **Database Archive**.
- Click on the **Schedule** tab.
- Click on the **Calendar** icon in the **Run next on** field and select a date. It is suggested that you set it for a Friday. Next, set the time of day for a time when no one is likely to be using Alexandria AND a time that is *at least 10 minutes before* your **Rebuild** is scheduled to run. Change the **Repeat** drop-down menu to **Daily**.
- If you wish to be notified when an **Archive** is run, check the box and fill in your email address in the **Send Email Notification To** field. Do not check the box for **Perform Archive Before Running Operation**.
- Click on **Save All** in the upper-right corner of the window and close the **Utilities** window.
- Go to **Edit** on the menu bar and select **System Preferences**.
- In the **System Administration** section, click on **Site Information**.
- Click on the **Scheduled Events** tab and set the number of **Archives to Keep** to at least 10.
- Click on **Save** in the upper-right corner of the window.

To run a Rebuild immediately.

- Go to **File** on the menu bar.
- Select **Rebuild Now**.
- Select both **Run an Archive before rebuilding** and **Restart after a successful rebuild**.

Rebuild looks at every record and pointer in Alexandria's database. If it encounters any problems in the record, Alexandria will do everything possible to correct the problems; however, if the problems cannot be resolved, the record is deleted. The following procedures are recommended in conjunction with **Rebuild**:

At the end of the day on which Rebuild will be run:

- Click on the **Special** tab in the middle of the **Circulation** window.
- Click on the **System Info** subtab.
- Write down the first four figures (number of patrons, titles, copies, and transactions) that are shown in the left pane of the tab.
- Go home.

The first thing in the morning on the first work day after Rebuild has been run:

- Click on the **Special** tab in the middle of the **Circulation** window.
- Click on the **System Info** subtab.
- If the figures are the same, no problems were found.

- If the figures are different, there were problems found in your database that could not be repaired. Call Alexandria Tech Support (1-800-347-4942) and tell them and they will be able to help you restore from an Archive and bring your data up to date so that you have all your records.

4. Have a **UPS (Uninterruptable Power Supply)** or battery backup on the Data Station and test it.

Alexandria 5 uses TCP/IP technology for its communication and operation procedures. The server program, called the Data Station, must be running for any clients, also known as workstations, to search, circulate, run reports, etc. For Alexandria, there is one type of workstation — Alexandria **Librarian Workstations**. If the Data Station program is not running, NO ONE can view or change the data. (In case there is an extended power failure over the weekend, it is essential that you back up your data before leaving on Friday.)

In addition, the Data Station does all the work with the data; the clients simply ask the Data Station to perform various procedures. As such, the Data Station should be on the best machine available.

Since the Data Station does all the work, it has the ability to prioritize requests from the clients. Some procedures will be postponed temporarily while other more pressing procedures are addressed. The Data Station will, therefore, hold some things in memory to take care of when it is not so busy. If there is an interruption of power, your data can become corrupt if you do not have a UPS to protect it.

A UPS is an Uninterruptable Power Supply and is only meant to give you enough time to get to the Data Station, quit Alexandria, and shut down the machine appropriately. Do not connect unnecessary machines or appliances to a UPS since they will drain critical energy from the UPS.

5. Enable Security.

The Alexandria program comes without any security protocols activated. As such, unless you install an additional security program or enable security within Alexandria, anyone can launch Alexandria and have full privileges to add, remove, and change patrons, items, orders, budgets, vendors, subscriptions or routes or to check items in and out, assign and forgive fines, etc. It is strongly recommended that you enable security within your Alexandria preferences.

In addition, if your Data Station is publicly accessible and without some form of system security, someone could delete, move, or rename your data file. It is, therefore, strongly recommended that you install and enable a system security program. Some operating systems come with such security built in.

To enable security:

- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **Operators** in the **System Administration** category.

- Click on the **Add (+)** icon at the bottom-left of the window.

- Fill in the **Username** and **Password**. Fill the same password in the confirm **Password** field. Enter the **Email Address** of the user.
- Set the **Group** of security using the drop-down menu. The first person entered must be the **Library Administrator** or **District Administrator** level person. More than one person may be given these groups.
- If you are in a Central Union system, check the **Site ID Codes** for which the operator will be granted privileges.
- Click on **OK**.
- Check the box for **Require User Login**.
- Click on **Save** on the **System Preferences** window, then, close the **System Preferences** window.

To customize the privileges of a security group:

- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **Security** in the **System Administration** category.
- Click on the **Security** tab.
- Double click on the **Security Group** you wish to customize.
- Using the drop-down menus on all **Sections** tabs, consider the options given and set privileges as you wish for operators with the security level.
- When finished, click on **Save** in the upper-right corner of the window.

6. Watch your screen at all times.

Alexandria offers audio clues to alert you to special circulation and program messages, this function isn't helpful if, for some reason, the computer sound is not working. Alexandria is also streamlined for certain procedures based upon assumptions that are often made in the library environment. Those assumptions may differ from what you desire. Always, ALWAYS watch your screen. Fully read each message and ensure that what you thought you did was exactly what the program claims you did.

7. When in doubt, contact Technical Support.

If your library is current on its support subscription, when you have a problem or a question, please contact Technical Support. You may call Technical Support 24 hours a day, 7 days a week, 365 (or 366) days of the year. Phone number: 1-800-347-4942.

During the busy time of the year (beginning of school, beginning of the calendar year, and inventory season), you may be asked to leave a voice message. Tech support will contact you as soon as they are available. The goal is to return these calls in less than an hour.

You can email Technical Support directly from Alexandria 6.0.1. Emailing from the program not only sends your message or question to Technical Support, but also informs them about your machine, its hardware, memory, your data, and the version of Alexandria you are running.

To email Technical Support:

- Click on the **Support** tab on the middle-right side of the **Circulation** window.
- Click on the **Email** subtab.
- Type the subject and the desired message in the fields provided on the **Email Tech Support** tab. If this isn't the current pane, click on the **Letter** icon to bring this pane to the front.
- Click on **Send Message** to send the message.

NOTE: You cannot email Technical Support if you do not have a return email specified in your **Site Information Preferences** and if you do not have an Internet connection.

D. Alexandria Help

Alexandria provides built in **Help** documents. These can be accessed in either of two ways.

In the upper-right corner of each Alexandria module window is a ? in a circle. This is the **Help** icon. If you click on this icon, it will open the help document associated with that window.

The second method is to view an index of all the help documents at one time. The **Alexandria Help Index** gives a list of the help documents grouped in categories. If you would like to view the help documents in an alphabetical listing, there is a link on the **Alexandria Help Index** that will take you to a help index that is in alphabetical order.

To view the Help Index:

- Click on **Help** on the menu bar.
- Select **Alexandria Help**.
- Click on the desired **Help** document.

E. ListSrvs and Tech Notes

1. Alex-Net

Alex-Net is a friendly forum that allows Alexandria customers to post questions, problems, and product ideas. Posted messages are then sent by email to the members of Alex-Net. This forum

enables users to help other users, share tips and tricks, or ask and answer questions about Alexandria.

To subscribe to Alex-Net:

- Go to Alexandria's website, **<http://www.goalexandria.com>**
- Click on **Support** at the top of the web page.
- Select **Librarian's Corner** from the **Support** drop-down menu.
- Select **Alex-Net & Other ListSrvs.**
- Check **Alex-Net** and fill in the form.
- Click **Submit**.

2. Tip of the Week

Tip of the Week is a part of the Alexandria web page that features a new tip for using Alexandria each week. The archives for Tip of the Week are a collection of tips for running Alexandria more smoothly. These tricks of the trade are written by the Alexandria staff librarians. You may view them every week both via email or on our website.

To receive the weekly Tip of the Week emails:

- Go to Alexandria's website, **<http://www.goalexandria.com>**
- Click on **Support** at the top of the web page.
- Select **Librarian's Corner** from the **Support** drop-down menu.
- Select **Alex-Net & Other ListSrvs.**
- Check **Tip of the Week** and fill in the form.
- Click **Submit**.

To view the current and past Tip of the Week documents:

- Go to Alexandria's website, **<http://www.goalexandria.com>**
- Click on **Support** at the top of the web page.
- Select **Librarian's Corner** from the **Support** drop-down menu.
- Click on **Tip of the Week**.
- The current Tip of the Week is in the main frame of the window.
- To view previous tips, click on **TOTW by Subject** in the **Tip Archive** box on the right side of the window.
- Click on the desired **Subject**.
- Click on the desired tip in the list.

3. Tech Notes

Our Tech Support personnel have written many excellent Tech Support documents for your benefit. These can be found on our Alexandria website.

To view Tech Notes:

- Go to **<http://www.goalexandria.com>**
- Click on **Tech Notes** under **User Favorites** on the left side of the window.
- Select the appropriate **Tech Notes** group.
- Select the desired **Tech Note** document from the list given.

2 Circulation

Estimated teaching time: 1 hour

Estimated time for Let's Practice: 5 minutes

Circulation is the main window of Alexandria. Before proceeding to teach **Circulation**, have the attendees view the window to familiarize themselves with the layout. If the **Circulation** window is not active, click on **Show** and select **Circulation**.

A. Menu Bar

1.Alexandria (Macintosh Only)

This menu is found on the left-side of your screen between the **Apple** and **File** menus. Here you can E-mail Technical support and view the **About Alexandria** splash screen which lists the version you are running. This is also where you will find the **Quit Alexandria** command along with an option to access **System Preferences**.

2.File

Note that you can create a new word processing document, open a file, save a file, save a file as text, import a transaction script, **Archive Now**, **Rebuild Now**, print, log out, and quit Alexandria (Windows only) from the **File** menu.

3.Edit

Here you will see the standard editing options of **Cut**, **Copy**, **Paste**, **Undo**, **Redo**, and **Find** as well as being able to access Alexandria's **Preferences**. We will look at **Preferences** at the end of the class.

4.Show

All major database modules are located under **Show**. Choose **Patrons** to add or modify patron records. Choose **Items** to catalog books, audio-visual materials, equipment, etc. **Subscriptions** and **Routes** are used for managing periodicals. **Orders**, **Budgets**, and **Vendors** are for acquisition purposes. Also notice the hot keys that are listed on the right of the **Show** menu. From anywhere in the program, these hot keys will open the indicated module. Nothing is more than three clicks away in the program, but it could be extremely shorter with hot keys.

5.Tools

From the **Tools** drop-down menu, you may access **Authority Control**, **Map Editor**, **Reports**, **Utilities**, use **Explore Builder**, **SIF Management** or the **Super Summary Template Editor**, view **Circulation Statistics** or the **Report Queue**, **Import**, **Export**, and run **Utilities**.

6.Links

This is a launcher. Just place any program or document (or its shortcut or alias) you want to be able to launch on this machine in the **Link Menu** folder and it will appear here. For instance, you may wish to put your substitute instructions in the **Link Menu** folder on the **Circulation** computer.

7.Window

Every currently open window will be listed under this menu. If you have several saved lists from searching that you are using, but you cannot view them all at once, you will find them under the **Window** menu so that you can switch between windows.

8.Help

Here you may view the release notes or the **Alexandria Help**. (On Windows, you can also email Technical Support form here, update your registration information, and view the **About Alexandria** splash screen which lists the version you are running. On Macintosh, you can also update your registration information here.)

B. Circulation Window

1.Circulation Menu (Gear icon)

When you click on the **Gear** icon, the **Circulation** menu opens. This contains a few additional commands for **Advanced Bookings** and displaying all connected clients and broadcasting a message to all clients. Although some common **Circulation** commands also appear on this menu, they are readily available in the **Circulation Mode** drop-down menu immediately to the right of this icon.

2.Circulation Mode

Located at the top left next to the command line, it is a drop-down menu for selecting the procedure or process for the program to perform. The selected mode will remain visible.

3.Command Line

The **Command Line** is the field at the top of the **Circulation** window in which commands are typed or barcodes are scanned or typed.

4.Current Patron Pane

This pane shows the patron whose record is being viewed or modified. The subtabs at the bottom of this pane enable you to view the patron's **Details** (items checked out, reservations, holds, charges, payments, etc.), **Notes** (**General Notes**, **Contact Notes**, **Patron Alert Notes**, etc.) and open the **Patron Lookup** window by clicking on the **Lookup** button.

5.Current Item Pane

This pane shows the item and copy record which is currently being viewed or modified. The subtabs at the bottom of the pane enable you to view the **Details** for the item **Details** (publication information, copy information, etc.), **Copy Stats** (current status, previous checkouts, etc.), **Notes** (view **Summary**, other item and copy notes), and **Lookup** (search for titles using the **Item Lookup** window).

6.Tabs

1.Circulation Tab

The first tab at the bottom of the window is the **Circulation** tab. Visible on the bottom half of the window, the **Transaction Log** is a running record of the transactions or changes made to the database. You cannot change anything in the log. If you make a mistake, you can correct it, but you cannot delete it from the log just as you cannot go back in time and undo a mistake.

There are two other options for the **Circulation** tab. If you click on **Renewals** at the top of the tab, the **Renewals** pane for the current patron will be displayed which will allow you to renew one, some or all of the items checked out to the patron, change the due date for an item or declare an item lost. If you click on an item in the **Renewal** window, that item will be displayed in the **Current Item** pane.

Homeroom is the last option. If you click on **Homeroom**, the window will display a list of the homerooms you have used for your patrons on the left side of the tab. When you click on one of the homerooms listed, the patrons in that homeroom will be listed in the right pane of the tab. If you double click on a patron in the list, that patron will be shown in the **Current Patron** pane.

2.Command Help

This is the second tab at the bottom portion of the window. It provides detailed information about the **Circulation** commands. If you would like to learn how to place holds or reservations, change patron locations or copy locations from the **Circulation** window, you can click on the **Command Help** tab, find the appropriate command, read the description and even use the command at the bottom of the tab. There are three different views of the **Command Help** that can be selected -- **All Commands** which presents a list of all **Circulation** commands, **Common Commands** which lists the most commonly used commands; and **Data Manipulation Commands** which gives those commands used to make changes to patron or item records.

3.Holds Tab

The **Holds** tab shows either the patron holds or item holds depending on which subtab is chosen at the top of the tab. When a patron or item is current, you may view, edit or remove holds.

4.Reservations Tab

The **Reservations** tab shows either the patron reservations or item reservations depending on which subtab at the top of the tab is chosen. Reservations can be removed quickly and easily using the **Remove** button.

5.Charges Tab

The **Charges** tab is used for charging fees, accepting payments, making refunds and managing credits. There are four options for viewing information on the **Charges** tab all of which are accessed by clicking on the desired subtab at the top of the window. Clicking on **Charges** at the top of the window will enable you to see a list of the charges for the **Current Patron**. The **Payments** subtab opens the **Payments** pane showing a list of payments made by the patron and these can be edited, forgiven, or receipts printed for the payments. The **Refunds** subtab opens a pane showing any refunds or forgiven charges made to the patron and these can be edited or receipts printed using this pane's functions. The **Credits** subtab opens the **Credits** pane and enables you to view and manage credits due the patron.

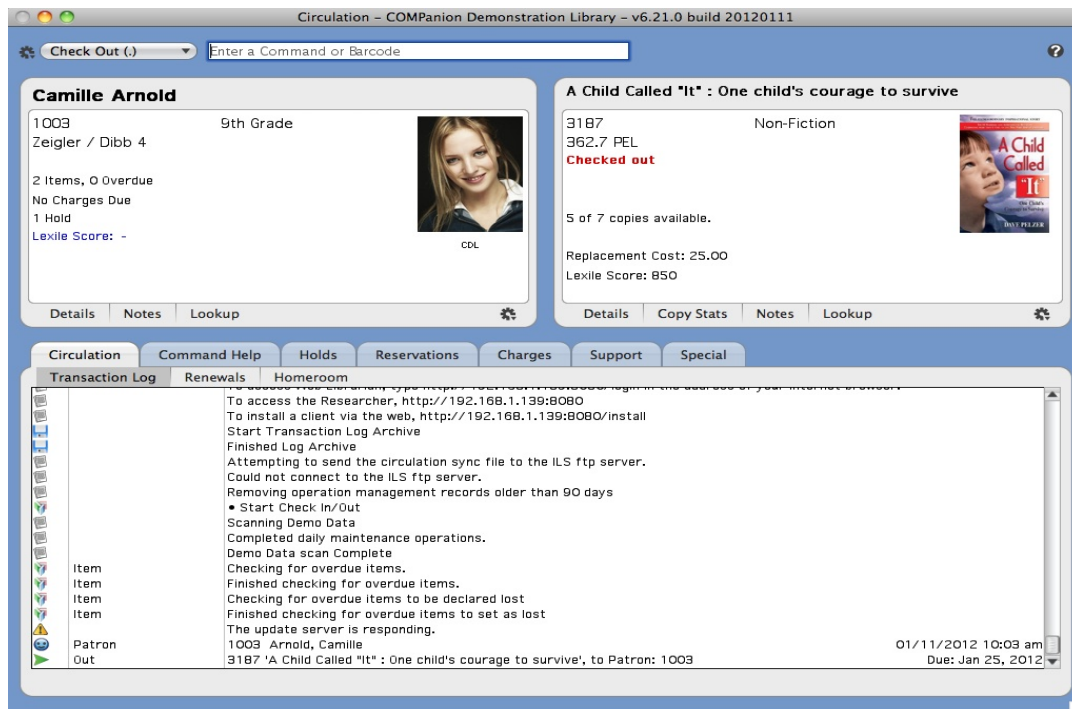
6.Support Tab

The **Support** tab is used to email Alexandria's Technical Support staff, send data files to and retrieve data files from COMPanion Technical Support via FTP.

7.Special Tab

The **Special** tab provides circulation statistics and **Cash Drawer** functions on the **Status** tab. The other subtab options are **System Info** which gives a detailed information on your operating system, available memory, and the number of records in various categories such as **Patrons**, **Item Titles**, **Item Copies**, **Transactions**, **Statistics Records**, etc.; **License Information** which provides information on the product registration; and **Activity Monitor** which shows the current connections to your Alexandria Data Station.

C. Check Out



To check out an item:

- Make sure the mode is set to **Check Out**.
- ALWAYS bring up the patron first (even though, in real life, the patrons usually hand you their items before they give you their library cards or tell you their names).
- Set the **Override** date, if necessary.
- Type or scan the barcodes of the items to check out.
- Respond to any **Circulation Alert** messages.
- When typing barcodes rather than scanning barcodes, always follow the barcode with an **<enter>**.
- If using an override date, clear it by typing a period (.) and pressing **<enter>**.

1. Check out *A Child Called "It"* (3187) to Camille Arnold (1003).

Look at Camille's record in the **Current Patron** pane. It shows her name, her barcode, the policy she is on (9th grade), her location (or homeroom), and her picture. It also shows a summary of her account — how many copies she has checked out, how many of those copies are overdue, how many holds, in-stock holds, reservations and reserves she has, and the total amount she owes in fines.

If you would like to change the **Location** term, homeroom, to teacher, room number, location, district, department, cell, etc., you change it in the **Terminology Preferences** which are found in the **System Administration** category of **System Preferences**. Click on **System Preferences** under the **Edit** menu to open the **System Preferences** window. On Macintosh, you can also access **Preferences** from the Alexandria menu.

Pictures are not required.

Policies govern how many items can be checked out by the patron, for how long, what fines are charged, can holds be placed and, if so, how many, etc. The demo data has policies for each grade in the demo. The only **Patron Policies** that exist when you first launch Alexandria are **Standard Patron** and **System Patron**. You need to establish a policy for each patron and item group that differs.

Look at the item information for *A Child Called "It"* in the **Current Item** pane. It shows the title, the copy barcode, its policy (Non-Fiction), the call number, the status of the copy, replacement cost, condition code, number of copies available and total number of copies.

Look at the **Transaction Log**. Note that it shows that Camille Arnold on today's date and at the indicated time, checked out *A Child Called "It"*, barcode 3187. Note the due date at the far right. This due date is calculated by the policy assigned to that item.

2. Check out *Across a Dark and Wild Sea* (3064) and *The Complete Dog Book for Kids* (3129) to Rebecca Eckhoff (1032).

Inform the attendees that as long as the patron barcodes are never the same as the item barcodes, there is no need to clear the previous patron in order to switch to a new patron. Just scan the new patron's barcode.

If patron barcodes are the same as item barcodes, you must always put a "P" in the command line before scanning the patron barcode. It is recommended that you change either the patron or the item barcodes to remove the conflict.

Look at the **Transaction Log** and you will see the new entries for Rebecca checking out *Across a Dark and Wild Sea* and *The Complete Dog Book for Kids*. The entry for Camille is still listed. The **Transaction Log** will help you to remember what you did last if you are interrupted in the middle of the process.

D. Override Dates

Override dates are used for exceptions to the rules. They can be used to extend or shorten the checkout period for just one item, for all the patron's current transactions, or with multiple patrons.

Override dates stay until you change modes or clear them. To clear an **Override Date**, type a period (.) and press **<enter>**. (Make sure every attendee clears the override date before proceeding to the next example.)

Override dates perform different functions in different modes. In **Check Out**, it is the new due date. In **Renew** mode, it is the new due date for the item being renewed. In **Bookdrop** mode, it is the date the item was returned. In **Statistics** mode, it is the date used to mark the usage. In **Inventory** mode, it is the last date the item was seen or inventoried.

To set an override date:

- First, enter the desired mode.
- Type period (.), then the desired date in **MMDDYY** format and press **<enter>**.

To clear an override date:

- Type a period (.) and press **<enter>**.

In doing this exercise, put in the override date first, then change the patron. Point out that changing the patron did not get rid of the override date. Point out that the good thing about this is that

the override date is in there until you take it out. The bad thing about it is that it is in there until you take it out.

3. **Check out** *Azerbaijan* (3430) and *The American Spirit: Meeting the Challenge of September 11* (3207) to Jami Stark (1009) until the end of the school year. (Remember to clear override date when no longer needed.)

E. Circulation Messages

4. **Check out** *The Last Book of the Universe* (3191) and *B. Franklin, Printer* (3027) to Marijane Lou Coots (1036). Choose Yes to check out the second item. Note the Transaction Log.

Note the **message** that appears is accompanied by a **special sound**. Remember that sounds may not always be available so **they should watch their screens for messages such as these**.

This copy somehow managed to get back on the shelf without being checked in. Since it is in Marijane's hands, choose the default **Yes** to check in the item.

Notice that the **Transaction Log** shows that it was checked in from Todd Malta and then immediately checked out to Marijane. The item was not overdue, but if it had been and fines were accruing, a **Fine** window would appear.

It is important to note that the **default** in this message was **Yes**, check in the item. Scanning any barcode — patron or item — would have selected the **Yes** choice and checked the copy in from Todd. If your sounds did not work AND you were not paying attention to the screen, if you had scanned a third item that Marijane wanted, it would not have been checked out to her because the message was still on the screen at the time. **Remember to ALWAYS watch the screen**.

5. **Check out** 3520, 3523, and 3072 to Joseph Todd Berol (1014). (Choose Override and then choose Cancel.)

The first item checks out to Joseph without incident, but checking out the second item to Joseph would **exceed the policy** which only allows him to check out a maximum of three items at a time. If you are on the appropriate **security level**, you will see the message that allows you to cancel the transaction or to override the policy and check the item out to him anyway.

Cancel is the **default**. Pressing <enter> would cancel the checkout. Scanning a third item would also cancel the transaction. **Items CAN walk out of your library without being checked out if you are not paying attention to the screen**.

Override is the non-default action on this message. To perform the non-default action, click on **Override**.

Type the third barcode and watch as the message reappears. Just because you selected to override the maximum number for the previous item, Alexandria does not assume that you want to override all items for that patron, that session, or that day. You must override each item you desire to check out when the policy limit has been reached or exceeded.

Click on **Cancel** or press <enter> to cancel the transaction. The item scanned appears in the **Current Item** pane, but it still shows as **Available**.

F. Patron Details (Q)

Joseph has more items checked out than the items we just did. Click on **Details** in the **Current Patron** pane to see the other items that are checked out to him.

The **Patron Details** shows you the patron's name, barcode, picture (if any), titles, barcodes, call numbers and due dates for items checked out, the fines and cost for overdue items, the titles on hold, the copies on in-stock hold, reservation, or reserve, and all the fines. In addition, some basic patron and statistic information and any attachments or notes are at the bottom.

The **Patron Details** window may be unlocked by clicking on the **White Ruler** icon, then clicking on the **Lock** icon and selecting **Unlock Document**; then, it is a word processing document with all the word processor tools available in COMPedit, COMPanion Corporation's own word processing program. This allows you to remove things you do not wish to print such as notes, the picture, etc. or to add comments such as "Parents, please sign and return" to the document before printing.

Adding or deleting information in the word processor version of the **Patron Details** does not change the information permanently. Closing the window and reopening it by clicking on **Details** again will return the report to its original format. There is no way to permanently modify a report in Alexandria. Close the **Patron Details** window.

You may save this document as a .txt file or in RTF format so that it can be opened in another word processor.

G. Item Details (Q=)

H. Bookdrop Mode (B)

6. Check in 3129.

There are times when a patrons may check out an item and decide that they prefer a different item. When this happens, it is easiest to use the single bookdrop method to check in the one item because it will leave you in **Check In** mode with the patron current so that you are ready to scan the new item. To do this, type **B** and scan the barcode of the item.

Notice that the patron to whom the item was checked out is shown in the **Current Patron** pane.

For the remaining exercises, we will enter **Bookdrop** mode by typing a **B** and pressing **<enter>**.

7. Check in 3013.

When an item is overdue and fines are charged, the Fine window opens. You may just process the fine or you may add additional charges, forgive the fine or a portion of it, or take a payment.

8. Check in 3085.

Notice that when this barcode is scanned, no patron is shown in the **Current Patron** pane. Look at the entry in the **Transaction Log**. This indicates that the item was already checked in and that the item was inventoried (the inventory date changed to the current date).

9. Check in 3193.

This item has a hold on it and you are notified of the hold so that the item may be set aside and a notice printed to inform the patron who placed the hold.

10. Check in 3430.

This item was checked out using an override date. Notice that it does show the date that it was due.

To check in a single item:

- In the **Command Line**, type **B** and, then, scan or type the barcode of the item to be returned. (This will check the item in without changing the **Circulation** mode.)

To check in multiple items:

- To enter **Bookdrop** mode, there are three methods:

In the **Command Line**, type **B** and press **<enter>**.

OR

Choose **Start Bookdrop** from the **Circulation Actions** (gear) menu.

OR

Click on the drop-down menu next to the **Command Line** field and select **Bookdrop**.

- Set the **Override** date for the date the copies were or should be listed as returned if different from today's date.
- Type or scan the barcodes of the copies to check in.
- Respond to any **Circulation Alert** messages that appear.
- When finished using the **Override** date, clear it by typing a period (.) and pressing **<enter>**.

NOTES:

- If patron barcodes are the same as item barcodes, you must always put a **P** in the **Command Line** before scanning the patron barcode. (It is recommended that you change either the patron barcodes or the item barcodes to remove the conflict.)
- When typing barcodes rather than scanning barcodes, always follow the barcode with an **<enter>**.

Let's Practice

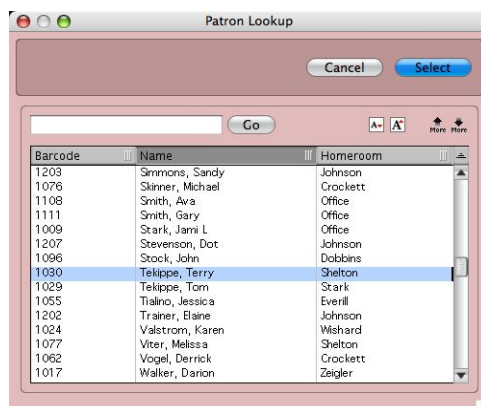
- Check out the item, *Above & Beyond* (3051) to Michelle Sciera (1026).
- Check out the item, *The Life of a Nazi Soldier* (3205) to Luann Larimer (1033).
- Check out the items, *Aladdin* (3151), *The Adventures of Tom Sawyer* (3087) and *The Autobiography of Meatball Finklestein* (3426), to Derrick Pichon (1006).

3 More Circulation

Estimated teaching time: 1/2 hour

Estimated time for Let's Practice: 15 minutes

A. Locate a Patron by Last Name (L)



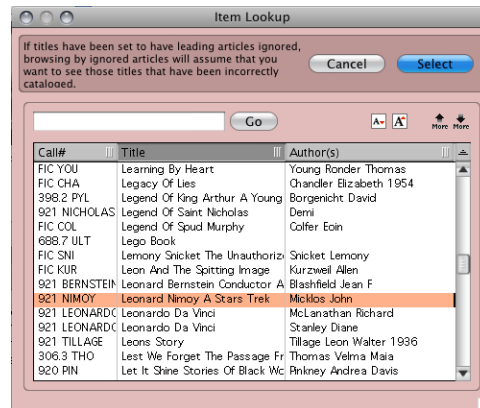
NOTE: Always put a space between the **L** and the text for your search. Although the space is not required, there are other commands such as **LM (Lost Mode)** and **LF (Locate by First Name)** which will cause confusion -- if you type LFRAN, are you searching for a first name beginning with RAN or a last name beginning with FRAN? Alexandria will consider it to be the **LF** command instead of a last name search. So, it is recommended that you use the **<space>** between the command and the text.

1. Locate Tom Tekippe and make him the Current Patron.

To look up a patron by name:

- Either click on the **Command Help** tab and choose **Locate Patron** or type **L**.
- Type as much of the patron's last name as needed and press **<enter>**.
- When searching for a patron or item, you need only type as much of the title or last name as is needed to get to the general area on the **Browse** window (i.e. Tek for Tekippe). Use the two **More** arrow buttons to show you more selections prior to or after your search entry.
- Click on the correct name to highlight it and then click **Select** or double click on the correct name.

B. Locate an Item by Title (T)



2. Locate the title, *Leonard Nimoy : a Star's Trek*.

To look up an item by title:

- Click on the **Command Help** tab and choose **Find Title** or type **T**.
- Type the first part of the title and press **<enter>**.
- When searching for a patron or item, you only need to type as much of the title or last name as is needed to get to the general area on the **Browse** window. (i.e. Leon for *Leonard Nimoy : A Star's Trek*). Use the two **More** arrow buttons to show you more selections prior to or after your search entry.
- Click on the correct title to highlight it and then click on **Select** or on the correct title.

C. Place a Hold on a Title (H)

3. Place a hold on *Leonard Nimoy : A Star's Trek* for Tom.

To place a hold:

- First, scan or type in the patron's barcode to make that person the **Current Patron**.
- Next, type the command, **T**, and type enough of the title to take you to the correct part of the title list.
- Select the title from the list. Double click on the title or click on **Select** to make the selected title the **Current Item**.
- Type **H** (for **Hold**) and **=** (for the **Current Item**) (e.g. H=) and press **<enter>**. NOTE: You may also type **H** and the barcode of the item (e.g. H1234).

Although a barcode must be used to place a hold from **Circulation** (either by typing the barcode number or using the **=** command), a hold is against the item title record. If multiple

items have the same title, the hold is only against the title with the barcode used when placing the hold.

If one copy of that title is available, the hold becomes an **in-stock hold** waiting for the patron to pick up the item.

To place multiple holds for a single patron:

- First, scan or type the patron's barcode to make that patron the **Current Patron**.
- Next, type the **H** command and press **<enter>** in the command line. This changes the mode to **Hold** mode.
- Now type **T** and the title. Select the appropriate title. This makes the item the **Current Item**.
- Type **=** and press **<enter>**. A hold will be placed on the **Current Item**.

NOTE: Instead of the title search and the **H=** command, you may type **H {barcode}**.

NOTE: For Central Union customers, the **HC** commands allows you to place a hold on a particular copy. This ensures the hold is from your collection.

D. Place a Reservation on a Specific Copy (G).

4. Create a reservation for Keri Dobbins for the item, *African American Inventors* (3040) for the second full week of next month.

You will have to search for Keri Dobbins by last name.

In this exercise, you have both the title and the barcode of the item Keri wants. You may choose any of the three sets of directions to teach depending on which you feel is more appropriate for your attendees.

Reservations are **against specific copies for specific days**. Only the patron who placed the reservation can check out that copy. If a copy with a reservation is not checked out before the reser-

vation end date, the copy reservation will be **automatically removed after the end date** by the program and the copy will be available for checkout.

Related Commands: **GP** (Reservation by Patron), **GA** (Place reservation on any copy), **GB** (Place reservation on a copy), **GPP** (Patron Reservations Check Out).

To create a forward reservation:

- Scan or type the patron's barcode to make the person the **Current Patron**.
- Type **G** (think -- "Get it later") and type or scan the barcode of the item on which to place the reservation.
- Select the desired **Month** and **Year**.
- **Click, hold and drag** to highlight the dates for the patron's reservation for that item.
- Click **Save** when finished.

NOTE: You can replace the **G{barcode}** command with a title search and then type **G=** and press **<enter>**.

NOTE: To place reservations on **multiple copies of the same item title**, simply change the copy barcode drop-down menu to a different copy and place the same reservation. Repeat for as many copies as are needed.

NOTE: To place reservations on multiple copies of different item titles, type **G** and press **<enter>** to go to **Reservation** mode. Then, scan the barcode of the first copy to have a reservation. Place the reservation and save. Scan the copy or type the barcode (or do the title search and use the **=** command) for the second copy to have a reservation. Place the reservation and **Save**. Continue for all the other copies to place reservations on them for the current patron.

E. Renewing an Item (R, RA and Renewal Icon)

5. **Renew** *The American Spirit : Meeting the Challenge of September 11 (3207)* by typing **R** and the barcode.

To renew an item:

- If the item is present, simply type **R** for renew, then type or scan the item barcode number.

Notice that it shows that it was renewed by Jami Stark and it lists the new due date.

Notice that the mode was not changed.

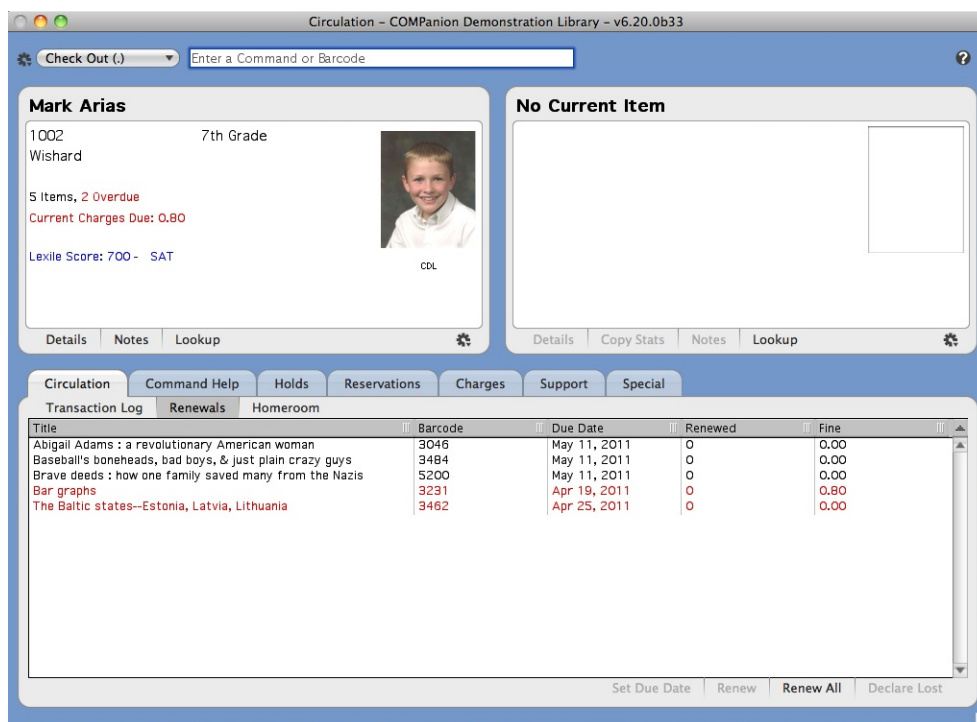
6. **In Renewal mode, renew items 3190 and 3167.**

To renew multiple items:

- Type **R** and press **<enter>** or select **Renew Patron Items** from the **Actions** menu.
- Notice that the mode was changed this time.
- Scan the barcodes of the items to be renewed.
- When you are finished renewing, type a period (.) and press **<enter>** to return to **Check Out** mode.

- Notice that the two items have been renewed.

7. **Mark Arias would like to renew three of his books, but did not bring them with him. Renew *Bar Graphs*, *Baseball's Boneheads*, *Bad Boys*, and *Just Plain Crazy Guys*, and *The Baltic States : Estonia, Latvia, Lithuania* using the Renewal window.**



To renew items not present:

- Enter the patron's barcode number.
- Click on **Renewal** on the **Circulation** tab.
- Select the titles to be renewed. (NOTE: You may select individual titles by holding down the **<Cmd>** key (Macintosh) or **<Ctrl>** key (Windows) and clicking on the desired titles.)
- Click on **Renew** at the bottom of the window.
- Respond to any circulation messages that appear.

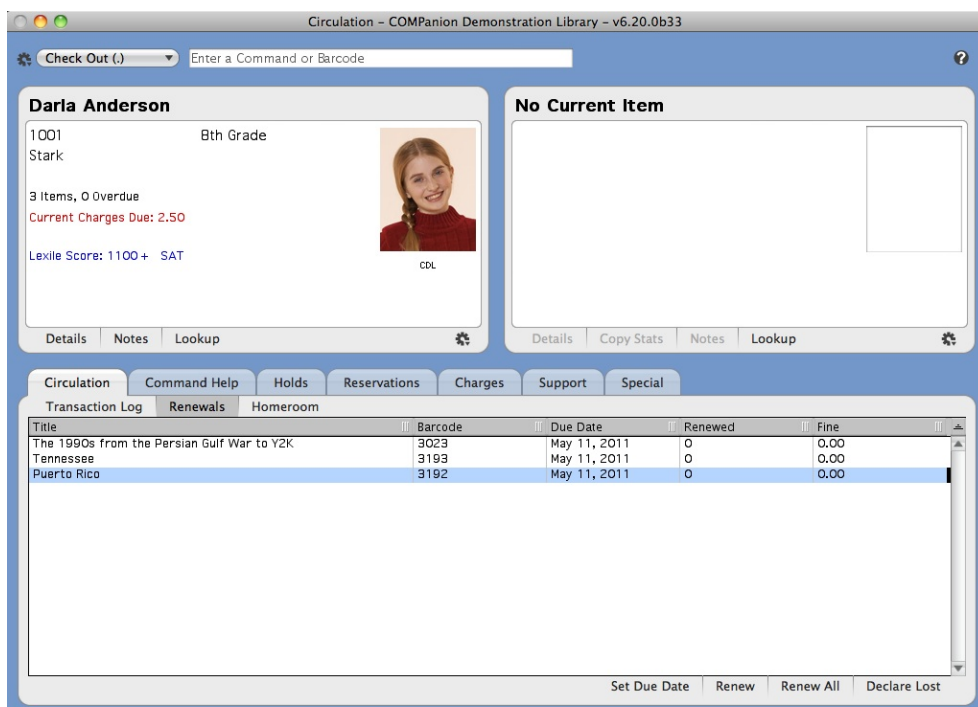
8. **Todd Malta (1013) would like to renew all of his books, but did not bring them with him. renew them using the RA command.**

To renew all items for a patron:

- Make the patron the **Current Patron**.
- Type **RA** and press **<enter>**. This will automatically renew all items checked out to that patron.
- Respond to any circulation messages that appear.

NOTE: These same functions may be accomplished using the **Renewal** window. Simply click on **Renewal** on the **Circulation** tab, then use the buttons at the bottom of the pane.

F. Declaring a Copy Lost



9. Darla Anderson (1001) has lost the book, *Puerto Rico*. Declare it lost.

To declare an item lost:

- In **Check Out** mode, scan or type the barcode of the patron with the lost item(s). If the barcode was typed, press **<enter>**.
- Click on **Renewal** on the **Circulation** tab to open the **Renewal** pane.
- Highlight the item(s) to be marked lost.
- Click on the **Declare Lost** button.
- Complete the process in the **Charges** window on which you may forgive a portion or all of the charge, add an additional charge, take a payment, and print a receipt as desired.

This will automatically check the item out to **Patron** barcode **1**, the **Lost Copies** patron, and mark the item as lost.

Notice the **Transaction Log** shows the item was lost and how much the patron was charged.

When declaring a copy lost by a specific patron, **DO NOT** check the item in first. When the item is declared lost from the Renewal window or by using the Lost Copies patron (1) and

typing the barcode of the lost item without bookdropping the item ties the charge for the lost item to the patron.

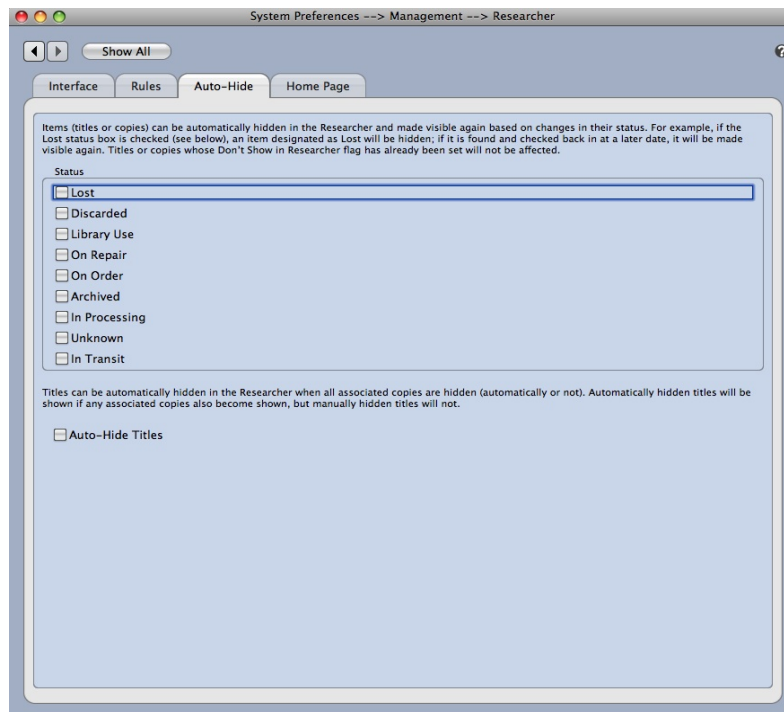
Lost items are not automatically deleted. They show to the patrons as **Lost** in the **Search Results** (if the only copy) and **Lost** in the **Item Details** unless you set your **Researcher System Preferences** on the **Auto-Hide** tab.

When you are ready to permanently remove lost copies, use the **Remove Lost Copies** utility found in **Copy Utilities**.

NOTES:

- When searching for a patron or item, you only need to type as much of the title or last name to get to the general area on the **Browse** window (e.g. And for Anderson). Use the two **More** arrow buttons to show you more selections prior to or after your search entry.
- When using the **T** command, if you type in a leading article or leading punctuation, Alexandria will search using that article and will not find the title if the **# of Non-filing Characters** field is set to ignore those characters. To find the title, it might be necessary to try the search with *and* without the leading article or punctuation. Leading characters in title tags other than the 245 tag are ignored based upon MARC record standards. See **Alexandria Help -- Leading Articles** for more information.
- In-stock holds are removed when the copy is checked out. Checking out a different copy of the same title does not remove the in-stock hold.
- For Central Union customers, the **HC** command allows you to place a hold on a particular copy. This ensures the hold is from your collection.
- Using the **Lost Copies** patron tags copies for removal later. This feature enables you to account at the year's end for how many copies were lost and the value of those items.

- You may set your preferences to automatically hide lost and discarded items in Researcher.



- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **Researcher** in the **Management** section.
- Click on the **Auto-Hide** tab.
- Click on any of the types of copy status that you do not want to show in the **Researcher**.
- Click on **Save**.

Let's Practice

- Paul Rockwell forgot his library card. Locate his record and check out the item, *American Heroes* (3199), to him.
- Mitchell Miller (1034) wants to know if you have the item, *Basketball*. Check to see if you have that item and check it out to Mitchell.
- Bill Shelton (1004) called you and really wants the item, *The Colony* (3520). Place a hold on that item for Bill.
- Michelle Sciera's (1026) best friend just checked out the item, *B. Franklin, Printer*. Michelle wants it after her friend is finished. Place a hold on that item for Michelle.
- Keri Dobbins (1020) is teaching a unit on European history next month. She always uses the item, *Brave Deeds : How One Family Saved Many from the Nazis* (3252). She wants to reserve it so that she is sure it will be available for the first full week next month.
- Renew *The Baltic States : Estonia, Latvia, Lithuania* (3462).

4 Special Circulation

Estimated teaching time: 15 minutes

A. Statistics Mode (Y and Y@)

Statistics mode is used to add usage statistics to items that are used in-house and not checked out. Not only does the increase in statistics indicate that the library is being used, but, because you can record usage on reference items, it will enable you to know what reference items have been used and which have not been used.

The **Y** command is used for single usage of items and the **Y@** is used to easily record multiple uses of a single item.

1. **A class has just finished doing research in the library during which many books were used "in house." You want to record usage of these books not only to increase your circulation statistics, but to track usage of these items — *Bury Me Not in the Land of Slaves* (3800), *Bound for the North Star* (3713), and *Harriet Tubman* (5473). *Growing Up in Slavery* (5407) was used 8 times.**

To use Statistics mode:

- Type **Y** and press **<enter>**.
- Scan the barcodes of the item(s).
- When finished, type a period (.) and press **<enter>**.

To record multiple statistics for items:

- Type **Y@** and the **number** of usages to record and press **<enter>**.
- Scan the barcodes of the item(s).
- When finished, type a period (.) and press **<enter>**.

B. Charging Damages (DL) and Fees (F)

2. **Maryjane Lou Coots returned *B. Franklin, Printer* (3027) with slight water damage. Charge her \$3 for the damage.**

Code	Description	Fine
CUS	Custom Damage	0.00
INK	Ink Marks	1.00
PEN	Pencil Marks	0.50
WAT	Water Damage	2.50

Notes:

Fine Amount: \$0.00

Damage Codes are preset amounts to charge for certain damages. These codes and the amounts associated with them are set in the **Rules System Preferences**.

To add a new damage code:

- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **Rules** in the **Circulation** category and then click on the **Damage Codes** tab.
- Click on the **Add (+)** icon in the bottom-left corner of the window.
- Enter a **Damage Code** (this must be very short), a **Description**, and a **Fine** amount.
- Click on **OK**, then click on **Save**.

To edit a damage code:

- Double click on the **Damage Code** you wish to edit.
- Make any changes needed.
- Click on **OK**, then click on **Save**.

To charge damage using the **Damage Codes** command, the patron and item must be the **Current Patron** and the **Current Item**. Make the patron current by typing or scanning the patron's barcode or using the **L** command to locate the patron by last name or **Bookdrop** the item.

To charge for damage:

- Type the **DL** command either with the appropriate **Damage Code** or without and press **<enter>**. If you have typed the **DL** command and a **Damage Code** (i.e **DL INK**), then the patron will be charged the assigned amount. If you only type **DL** and press **<enter>**, you may then select one of the pre-defined **Damage Codes** or select **Custom Damage**.
- If you select **Custom Damage**, then enter a short description of the damage in the Notes field and the amount in the **Fine Amount** field. Lastly, click on **OK**.

3. Terry Tekippe lost his library card. Charge him \$1.00.

Fees may be charged in two ways. One way is quick and easy while the other is easy to remember. The simple method uses the **F** command entered in the command line along with the amount and reason. The longer, yet easier to remember method uses the **Charges** tab of the **Circulation** window.

To charge a fee using the **F** command:

- First, make the patron current by typing or scanning the patron's barcode or using the **L** command to locate the patron by last name.
- Type the **F** command (for Fee), then the fee amount, and, lastly, the description of the fee. Press **<enter>** when finished. (i.e. **F 1 Lost library card**)

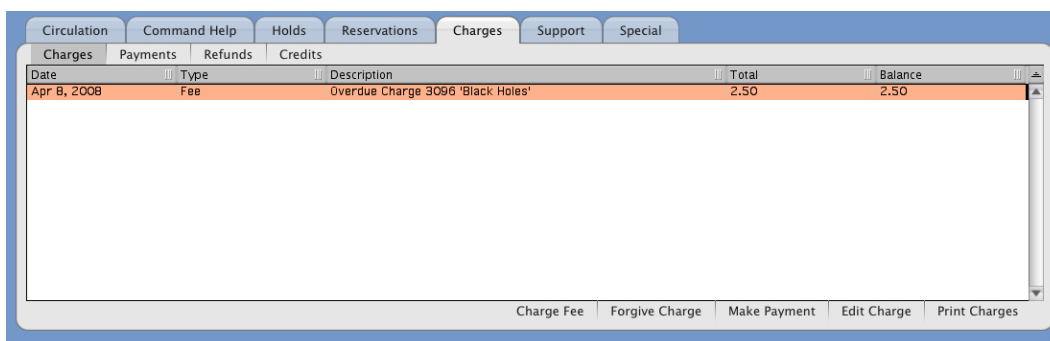
NOTE: Alexandria saves you key strokes because it recognizes a non-decimal number to represent a dollar amount (e.g. 3 for \$3.00) and single decimal figures are converted appropriately (e.g. 3.5 is recognized as \$3.50).

To charge a fee using the Charges tab.

- The patron being charged must be the **Current Patron**.
- Click on the **Charges** tab, then click on the **Charge Fee** button at the bottom-right corner of the window.
- Fill in the **Fee Comment** and **Fee Amount** fields. If a payment is being made or a credit is being applied, fill in the **Payment** and/or **From Credit** fields.
- Click on **OK**, **Cancel**, or **Charge Fee/Print Receipt** at the bottom of the window.

To pay or forgive a fee or fine:

- First, make the patron current by typing or scanning the patron's barcode or using the **L** command to find the patron locate the patron by last name.
- Click on the **Charges** tab and make certain that the **Charges** pane is the one being viewed.
- Highlight the fee or fine to pay or forgive.
- Click on the appropriate button — **Forgive Charge** or **Make Payment**.



- If you click on **Make Payment**, enter the amount the patron is paying, select method of payment, etc.

- Click on **Process with Receipt** or **Process** (to process without printing a receipt).

To add a note to an item record:

- The item copy must be the **Current Item**.
- Type ++ and then the comment (i.e. ++ Ink writing on p. 75).
- Press <enter>.

C. Discard a Copy (2)

Items are discarded for many reasons -- damage, overuse, no use, out of date, objectionable materials, mold, etc. Some of these items may need to be replaced with more recent publications, others may need to be reordered to meet the needs of the patrons while others will never be reordered. Using the **Discarded Notes**, it is possible to mark these items so that a list can be produced of items discarded for a particular reason.

Using the **Discarded Copies** patron provides a quick way to mark items as discarded and it has many benefits. First, you are able to easily identify items to reorder, secondly, you are able to print statistical reports showing how many items were discarded. Lastly, it is much faster to

use the **Discarded Copies** patron and then a utility to remove the discarded copies than it is to remove each copy and/or title individually.

4. **You have spent a busy day weeding. The following books are out dated:** *History and the History Teacher* (3507) and *Discipline and the Classroom Teacher* (3496). **You also found several items that have been worn out through such heavy use that they must be discarded —** *Bill Nye's Great Big Dinosaur Dig* (3604), *Harry Potter and the Chamber of Secrets* (5480), and *Famous Bears and Friends* (4877).

To discard an item:

- In **Check In / Out** mode, type **2** and press **<enter>**.
- The **Discarded Copies** patron will be the **Current Patron**.
- Scan the item's barcode.
- Select the reason for discarding the item, then click **Discard and change mode** button.

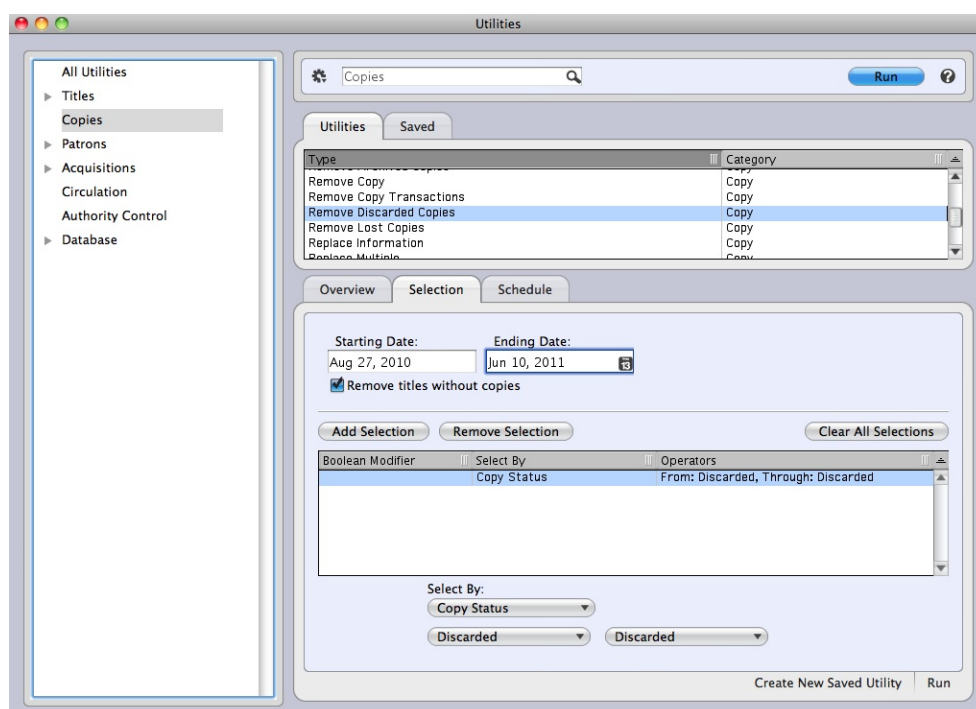
Use **Other** to be able to enter specific reasons for discard (e.g. No Use, Out Dated, Loved to Death, etc.) These reasons will be of great value if you need to reorder or replace certain titles.

- Scan the rest of the items being discarded for the same reason.
- When finished with the items being discarded for that reason, type a period (.) and press **<enter>**.
- Scan first item with a different reason and enter the new reason for discarding the item.
- Scan the rest of the items being discarded for that reason.
- When finished discarding, type a period (.) and press **<enter>**.
- Type an **X** to clear the **Circulation** window.

To permanently remove lost or discarded items:

- Click on **Tools** on the menu bar and select **Utilities**.
- Click on **Copies** in the left frame.
- Double click on the **Remove Discarded Copies** in the list in the main (right) frame.

- Click on the **Selections** tab and enter the appropriate dates in the **Starting Date** and **Ending Date** fields..



- If you want to remove titles for which there are no copies, check the **Remove Titles without Copies** box.
- Click on **Run**. When asked if you want to **Archive**, the answer is always **Yes**.

NOTES:

- Use the **Discarded Copies** patron to maintain a record of discarded items until the end of the school year if you must report the numbers of items discarded and the value of the items discarded.
- Using the **Discarded Copies** patron instead of just removing the discarded copies from each item record is faster and also provides information for reports that can be generated to assist in reordering items or in ordering more up-to-date items to replace discarded items. (See **Reports** chapter.)
- When discarding a copy that is checked out to a specific patron because of damage to the item, DO NOT check the item in first. Just check it out to the **Discarded Copies** patron and, when the **Discarded Copies Charges** window opens, charge the patron accordingly for the cost of the item.
- Whenever running any utility, run an archive or make a backup prior to running the utility.**

5 Patrons

Estimated Teaching time: 1/2 hour

Estimated time for Let's Practice: 15 minutes

The **Patrons** management module may be accessed by choosing **Patrons** under the **Show** menu. You may also click on the patron's name or on the words, **No Current Patron**, in the **Current Patron** pane of the **Circulation** window.

A. Patron Window

The screenshot shows the 'Patrons' management window. On the left is a list of patrons, sorted by 'Modified'. The list includes names like Wilcox, Gordon; Walker, Darion; Viter, Melissa; Tialino, Jessica; Stevenson, Dot; Silvey, Anna; Silver, Robert; Shultz, Theodore; Shelton, Bill; Selman, Steve; Scieszka, Benjamin; Sagaser, Dan; Rockwell, Paul; Robertson, Erica; Pichon, Derrick; Perry, Nicole; Oldham, Laura; Nix, Jeff; Munsch, Chris; Miller, Mitchell; Malta, Todd M; Malta, Matthew G; Kennedy, Maggie; Johnson, Wally; Everill, Randy; Donnelly, Charles; Coots, Marjane; Bush, Steve; Brotherton, Ryan; Bonham, Jason E; Berol, Joseph Todd; Bergerac, Joshua; Base, Ann; Arnold, Camille; Arias, Mark; Arches, Sunny Ralph; and Anderson, Darla (highlighted). On the right is a form for the selected patron, 'Anderson, Darla'. The form has tabs for 'Personal Info', 'Contact Info', 'Notes', 'Statistics', and 'Lexile'. The 'Personal Info' tab is active, showing fields for Site (CDL), Homeroom (Stark), 2nd Location, Student #, SSN, Susp. End Date, Birthdate, Graduation Date (Jan 1, 2015), Reading Level, User ID (1001), Sex (Female), Status (Active), and Grade (8). There is a 'Reset Password' button and a 'Can Review Items' checkbox. A photo of a young girl is shown next to the form fields.

Before proceeding with the actual process of adding patrons, modifying patrons, or removing patrons, view the **Patrons** menu at the top of the window and quickly review the fields of the **Patrons** management windows. Make sure that you know what each field is for, how they can be modified or used, and which are required. Focus on the required fields and the fields appropriate to your attendees.

1. Patrons Actions Menus

All commands that affect patrons are located in these menus. The **Actions** menu at the bottom of the left pane contains menu items for use with the patrons listed in the left pane. You'll see the options for finding patrons, importing, exporting, adding and removing patrons. The **Actions** menu located at the top of the right pane next to the lock enables you to unlock the record, show the patron's details or history, take, browse for, paste or remove patron pictures and access **Patron Utilities**.

The **Find** (magnifying glass) icon or **Find** on the **Actions** menu for the left pane opens the **Patron Selection Window**. The **Search Result Cap** drop-down menu in the upper-right corner of the window allows you to set a maximum number of results to show for your

search. In the bottom-left corner of the Patron Selection Window is another **Actions** icon. In order to have more options for selecting the patron(s), click on **Advanced** on this menu. Using the drop-down menu and the available **Boolean operators**, you may be very specific in your selection criteria.

Once a list of patrons appears in the left pane, use the up and down arrows on your keyboard. The highlighted patron's record is shown in the right pane.

2. Unlocked/Locked

When the **Locked** icon is displayed, changes cannot be made to the record. When the **Unlocked** icon is displayed, almost any field can be changed. An option to **Lock** or **Unlock** is also located on the **Actions** menu at the top of the window or you can just click on the icon to toggle between **Locked** and **Unlocked**. In addition, a hot key of **<cmd-U>** (on Macintosh) or **<ctrl-U>** (on Windows) will toggle between **Locked** and **Unlocked**.

3. Patron First Name

Enter the patron's first name and any middle initials in this field.

4. Patron Last Name

The patron's last name is a required field. It may contain multiple words or hyphens.

5. Barcode

Barcode is a required field. Barcodes can be alphanumeric (all letters, all numbers, or a combination of both.) They cannot contain punctuation or spaces. Barcodes must be unique and are required for both patrons and copies. Remember to keep the patron and item barcodes in separate ranges.

6. Patron Policy

Policy is a required field. Policies govern how many items can be checked out, how many overdue and still be allowed to check out, fine amounts, which items can be checked out or placed on hold, etc. Only two patron policies come with the system -- **Standard Patron** and **System Patron**. **System Patron** is the policy for the special patrons such as **Lost Copies** and **Discarded Copies**. You must establish a patron policy each time the rules differ for a patron group.

Personal Information Tab

7. Picture

When desired, either take the patron's picture or paste it from a file. When that patron is current in **Circulation**, the picture will display in the **Current Patron** pane and on the **Patron Details**. Patron pictures may be imported from the **Circulation** window using the **"zzpp"** command if the pictures are in jpg format, are named with the patrons' barcode numbers and are located in the same folder or drive.

8. Site

Site is the Alexandria generic term for the primary location identification and the terminology connected with this field may be modified to School, Library, Branch of whatever is desired. This field should be used to indicate the school or branch connected with the patron.

9. Location

Location is the Alexandria generic term for a sublocation for the patron. The term for this field may be customized using the **Patrons Management System Preferences**. It may be a room number, a teacher, department, etc.. In the demo, we have labeled this field **Homeroom**. While it is not a required field, this field appears in most circulation reports and on the **Current Patron** pane.

10. Sublocation

This field name can be customized in the **Patrons Management System Preferences** and, in the demo, it is labeled **2nd Location**. This field may be used as a secondary location such as a Language Arts teacher and period (i.e. Jones 4) or it may be used for other information that is short such as AUP status. The information recorded in this field shows in the Current Patron window immediately after the **Location** information. It does not appear on most major patron or circulation reports, but it is a selection for patron reports, circulation reports, and patron utilities. Sometimes, it is also a sort option.

11. Community ID

This field is not required but *must only contain information unique to this patron*. Customize the field name for your organization or library needs in the **Patrons Management System Preferences**. This field is used to match and update patrons during import if no barcode or **Government ID** match can be found. In the demo this field is labeled **Student #** and is usually used for the district-assigned student number.

12. Government ID

This field is not required but *must only contain information unique to this patron*. Customize the field name for your country or needs in the **Patrons Management System Preferences**. This field is used to match and update patrons during import, if no barcode match is found. In the demo, the field has been labeled **SSN**.

13. Card Expiration Date

This field is required and is based upon the default patron policy. If you do not want to have cards expire or have to renew them frequently, change the patron policies to expire in 9999 days rather than the default of 365 days. Expiration dates can be changed or renewed through the **Patron** utilities. If you have selected **Disable Expiration Date** in **Patrons System Preferences**, this field will not be shown in the patron's record.

14. Suspension End Date

If the patron's status is set to **Suspended**, enter the date the suspension will expire in this field.

15. Birthday

When desired, enter the birthdays here. The birthdate only appears on detailed patron reports. This information may be useful if you have two patrons with the same name.

16. Graduation Date

This field only appears if registration codes indicate that you are a school library. When the registration codes indicate a school library, this is the date this patron will graduate from the last grade of school as specified in the **Patrons System Preferences**. When the graduation date is set or changed, the grade will be calculated to match based upon the **Last Grade** preference under **Patrons System Preferences**.

17. User ID

This field is automatically populated with the barcode for the patron. If you allow patrons to place holds or check status and details in Alexandria's **Researcher**, then the patrons will enter their barcodes (**User ID**) and **Password (Last Name)**.

18. Password

Passwords are required and by default will be the patron's last name. **System Preferences** for the **Alexandria Researcher** will determine if patrons are allowed to change their passwords. If the patron forgets his password, simply change it on this window and inform the patron of the change. Passwords are required for patrons to place their own holds or reservations, to check the status of their accounts, to renew their own items, and to update their addresses, phone numbers, or E-mail addressees. (Which changes are allowed are all based on the **Alexandria Researcher System Preferences**.)

19. Reading Level

The **Reading Level** field is provided for the reading level as determined by the study program tests. If you do not use a study program such as Reading Counts or Accelerated Reader, then ignore this field.

20. Gender

Defaults to **Unknown** for new patrons. **Gender** may be set to **Male**, **Female**, or **Unknown**. **Gender** only shows on detailed reports and it may be imported and exported.

21. Status

All new patrons default to **Active**. Any active patron may check out based upon the patron's policy. When a patron with a status other than **Actives** tries to check out, a warning message will appear to alert the librarian and provide the option of allowing checkout or canceling.

22. Level

This field name may be customized in the **Patrons System Preferences**. For school libraries, it usually should be called Grade or Year. When the **Level** equals PS (for Preschool) or JK (for Junior Kindergarten), K (for Kindergarten) or 1 through 12, the Alexandria program will advance the patron to the next level when the Advance Levels utility is done.

Contact Info Tab

23. Parent / Guardian

Enter the name of the primary parent or guardian. Letters to parents will be addressed directly to parents if this field is populated.

24. Phone

This is the primary phone number for contacting the patron. Additional phone numbers can be entered in the contact notes. This phone number will appear on many circulation reports.

25. Fax

If desired, enter the fax number here. This field only prints on detailed patron reports.

26. E-mail

Although this field is not required, it is helpful since it allows overdue notices, in-stock hold notices, or recall notices to be E-mailed.

27. Address 1 and Address 2

The address fields allow for a multi-line address such as a PO Box and street address or a suite number.

28. City

This should be the city of the patron's mailing address. However, on creation of a new patron from the **Patrons** management window, this field will default to the city specified in the **Site Information System Preferences**.

29. State or Province

Enter the state or province as it should be printed on a mailing label. On creation of a new patron, this field will default to the same state or province specified in the **Site Information System Preferences**.

30. Postal Code or ZIP Code

Enter the postal code or ZIP code for this patron. By default, when you are adding a new patron, this field will be filled with the same postal code or ZIP code from the **Site Information System Preferences**.

31. Country

When needed, fill in the **Country** field for the patron.

32. Contact Notes

This field is for additional contact information. Such information might include cell numbers, beeper numbers, additional E-mail addresses, guardians, parents' names and numbers, etc.

Notes Tab

33. Categories

Categories are a way to track patron groups or information that Alexandria does not currently provide a field for.

34. Alert Notes

Alert Notes appear in the **Circulation** window any time that patron is the current patron, whether that be for checking out a copy, returning or renewing a copy, or simply for viewing. The **Alert Notes** appear at all levels of security access that are allowed to circulate.

35. General Notes

General Notes only appear in the **Patrons** management window, the **Patron Details** and when the **Patrons Notes** button is clicked. They are only accessible with the security level of **Library Staff** or higher by default.

Statistics Tab

36. Statistics

This tab shows basic information on the number of copies the patron has out, how many are overdue, how many holds, reservations, and reservations the patron has, and monthly checkout statistics.

37. Keep Patron History

When checked, Alexandria will record all copies the patron checks out and when those copies are returned. In **Patrons System Preferences**, you can specify to keep history for all patrons in the database or you can check it here to keep it only for this patron. This box needn't be checked for Alexandria to track the last three people who checked out a copy or title.

Lexile Tab

The **Lexile** tab contains the **Lexile** field. For those libraries that have purchased the **Student Lexile** option, the bottom portion of the tab allows for the entering of 13 years of Lexile scores, testing sources and the date of the test.

38. Lexile

Enter the Lexile reading level for this patron in this field.

1. Add yourself as a new staff member.

To add a patron record:

- Go to **Show** on the menu bar and choose **Patrons** from the drop-down menu. (TRICK: You may also click on the **Current Patron's** name or on the words, **No Current Patron.**)
- Click on the **Add (+)** icon at the bottom of the left pane. A blank new patron record will open.
- Tab from field to field as you enter the information about this patron.
- Use the drop-down menus to indicate **Policy**, **Status**, and **Gender** for the patron.
- Click on the **Notes** tab to add notes.
- If you wish to keep **Patron History**, click on the **Statistics** tab and check the **Keep Patron History** box.

NOTE: You can use your **Patrons System Preferences** to set Alexandria to **Keep Patron History** on all patrons if that is what you want.

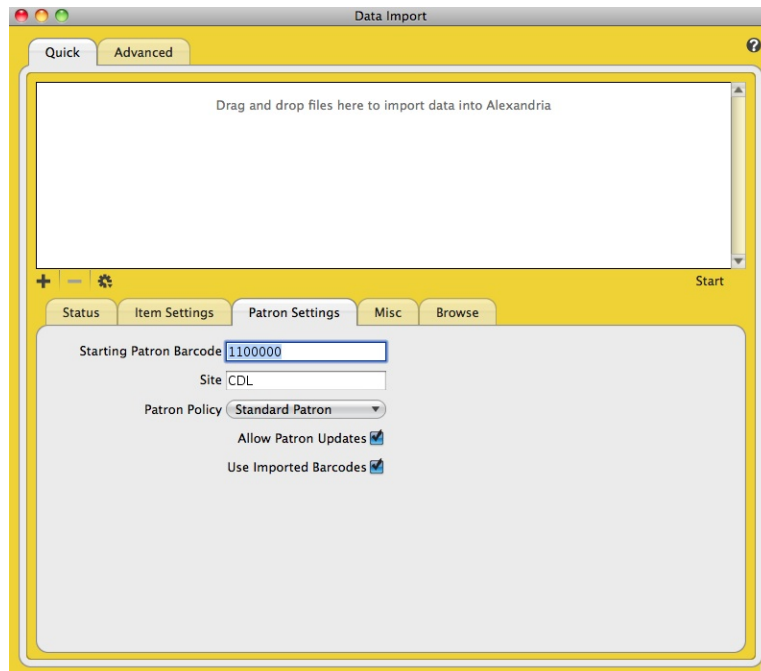
- When finished, click on the **Save** button.

B. Importing Patron Records

Patron records may be imported into Alexandria from a **tab-delimited file**. If you have a student information system that can export the data on the students in a *tab-delimited format*, please look the **Patrons** management window to determine what fields you wish to have included in the export from your student information system.

To import patron records:

- Go to **Tools** on the menu bar and select **Import** or drag the file from your desktop and drop on top of Alexandria.



- On the **Quick** tab, click on the **Patron** tab.
- Click on the **Add** (+) button at the bottom of the large field in the top section of the window in order to add a file to the list.
- Use the window that opens to find and select the file to be added. Highlight the file, then click on **Open** to add it to the list.
- Set your selections for the options at the bottom of the window.
- Click on **Start** under the large field at the top of the window to begin the patron import.

C. Modifying Patrons

2. Change Mitchell Miller's phone number to 253-3534.

To modify a patron record:

- Go to **Show** on the menu bar and choose **Patrons** from the drop-down menu.

- Click on the **Find** icon (magnifying glass) at the bottom of the left pane or click on the **Actions** icon (gear) and select **Find**. The window below will open.

- Enter the patron's last name in the **Last Name field** and press **<enter>**. Then, highlight the desired patron in the list in the left pane.
- Unlock the patron's record by clicking on the **Lock** icon or by choosing **Unlock Record** from the **Patron** menu.
- Make changes to the patron's record and click on the **Save** button.

D. Deleting Patrons

3. Delete yourself from your patron list.

To remove a patron record:

- Go to **Show** on the menu bar and choose **Patrons** from the drop-down menu.
- Use the **Find** icon at the bottom of the left pane and search for the patron you wish to remove. You may also use the **L** command in **Circulation** and then click on the patron's name in the **Current Patron** field.
- Highlight the patron's name in the left pane and click on the **Remove (-)** icon at the bottom of the pane.

NOTE: If the patron has outstanding items or fines, a dialog box will open informing you of this. Click on **OK**. Patrons cannot be removed if they have items checked out or if they owe fines or charges. You must declare any items lost, forgive any charges or fines and, then, you will be able to remove the patron.

NOTES:

- The only required fields for a patron record are **Barcode**, **Last Name**, **Policy**, **Status**, and **Gender**.

- Alexandria will fill in the **User ID** and **Password** using the patron's last name as the **Password** and the barcode for the **User ID**.

Let's Practice:

- Add your favorite movie star as a patron.
- Assign him/her to the Staff policy.
- Include an **Alert Note** that indicates that the patron left a jacket in the library.
- Go back into the patron record and remove the **Alert Note**.
- Remove the patron.

6 Items

Estimated teaching time: 1 hour

The **Items** management module can be accessed by choosing **Items** under the **Show** menu. You may also click on the current item's title or the words, **No Current Item**. Options to modify item and copy records, add new items and copies, and remove items and copies are located here. Since Alexandria can be used to track and inventory more than just books, the term item and title are generally used interchangeably. The **Items** management module is where cataloging occurs for all items and all media types (i.e. books, videos, equipment, etc.). Multimedia items, electronic files, and websites are also cataloged here.

A. Item Window and Item Menus

The screenshot shows the Alexandria v6 Items management interface. On the left, a list of items is displayed, sorted by title. The item 'The 7 habits of highly effective teens' is selected. The right pane shows the details for this item, including the title, call number (371.3 COV), policy (Non-Fiction), and various fields for publication information (Covey, Sean), subjects, categories, notes, summary, statistics, links, and SP. The 'Publication' tab is active, showing fields for medium (book), LCCN, ISBN/ISSN (0743264118), place (New York), publisher (Fireside), year (1998), extent (268), and series. A book cover image is also displayed.

Before proceeding with the actual process of adding items, modifying items, or removing items, view the **Items Actions** menus at the bottom of the left column and at the top of the right pane next to the **Lock** icon. Next, look at the fields of the **Items** window. Make sure that you know what each field is for, how they can be modified or used, and which are required. Focus on the required fields and what fields are appropriate to your attendees.

1. Actions Icon (Left Pane)

All commands that affect items are located in this menu or in the menu accessed by clicking on the **Actions** icon at the top of the right pane. You'll see the options for browsing through you items, finding items, adding, modifying, removing, duplicating items or copies, importing, exporting, and viewing the details.

2. Find Icon

The **Find** icon (magnifying glass) is used to find items using a specific criteria. The results of a search are shown in the left pane of the **Items** management window. When this icon is clicked, the **Item Selection** window opens. The primary view of this window is the Simple search view; however, clicking on the **Actions** icon in the bottom-left corner of the **Item Selection** window shows two other selections for searching — **Advanced Title Search** and **Advanced Copy Search** which provide additional searching options. When the desired field(s) are filled in, click on **Search** in the bottom-right corner of the window.

3. Up/Down Arrows

Click on the left arrow to go up to the previous item in the order shown in the left pane. Click on the right arrow to go to the down to the next item in the left pane. The **<up arrow>** and **<down arrow>** keys on your keyboard will also move you up and down in the list.

4. Actions Menu (Right Pane)

This **Actions** menu may be used to unlock the record, switch to MARC view, access **Item Utilities** and **Copy Utilities**, access **Mitinet Management**, add a copy, Assign a new bar-code or show any of the editors or the details, the **ISBN Calculator** or **Search Details**.

5. Lock and Unlock

An item or copy record cannot be modified if the record is locked. This security feature can be disabled in your **Display Settings System Preferences** if desired. When enabled, it will prevent you and others from making unintended changes. To unlock a record, click on the **Lock** icon at the top-left of the right pane.

6. Title

Put the title on the first line. If the title has a subtitle, enter it on a separate line starting with a colon (:). If the title has a statement of responsibility (i.e. edited by Isaac Asimov. Illustrated by Paul Zelinsky), enter it on a separate line starting with a forward slash (/). The **Title Editor** can also be used to enter title information. This field is keyworded as are other variant titles in the MARC record; however, this is the only title that will appear on the item details. **Title** is a required field when cataloging.

7. Call Number

The call number can be either the Dewey or LC classification for the item. All portions of the call number — prefix, classification, and suffix — go into the field. (This field is keyworded.)

8. Policy

The item policy for the item governs who can check out, place holds, etc. for this item. Each new copy will default to the same policy as the item, but can be changed. This is a required field.

9. Copies and Status Statement

Under the **Policy** drop-down menu is a statement showing the number of copies attached to the item record and how many are available.

There are two tabs for the item record — **Title Information** and **Copy Information**. Depending upon which tab is chosen, the sub-tabs and fields change.

Title Information

Publication Tab:

10. Author

This is the primary author of this item. Click on the **Author** editor link to enter additional authors or illustrators (700 tag). This field is keyworded as are the additional authors or illustrators. All author tags are displayed in the **Item Details**.

11. Volume

The volume can be a number, letter, etc. but this field is not keyworded. It is visible in the **Item Details** for the librarian and the patrons.

12.LCCN

The Library of Congress Catalog Number field is keyworded.

13. Edition

The edition description (large print, 1st, American, etc.) is not keyworded but is visible on the **Item Details**.

14. ISBN/ISSN

The International Standard Book Number field is keyworded. This field shows the first ISBN/ISSN entry. By clicking on the blue field name, the **ISBN/ISSN Editor** can be opened where multiple ISBNs may be entered and viewed. This feature has been added in preparation for the change from 10-13 digit ISBNs.

15.Lexile

Enter the Lexile level in this field. The Lexile is a number assigned to the item that reflects the reading difficulty level of the book.

16.Lexile Code

Enter the Lexile code in this field. This is the letter code that is given to books which, because of their writing style, cannot be assigned a Lexile number.

17. Title Match

This field is checked if the Lexile level was not determined by an exact match on the author, title, publisher and year, but only using the author and title for the match.

18. Don't Show in Researcher

If this box is checked, the item will not be shown in the Researcher.

19. Place

This is the city, state, or country where published. This field is not keyworded.

20. Publisher

Enter the name of the publishing company or division. This field is keyworded.

21. Year

Enter the publication or copyright year. This field is keyworded.

22. Extent

This is the physical description of the work; it can include the number of pages, illustrations, etc.

23. Series

This is the traced series that will appear on the **Item Details** and on catalog cards. This field is keyworded. Other series tags in the MARC records are keyworded, but do not display in the simple **Items** management window or on the **Item Details**.

24. Generic Medium Type

This is the format of the item. The only medium that comes with Alexandria is book; to add a different type, click on the drop-down menu and select **Add NEW Medium**; to remove a medium type, use catalog utilities to change all instances of that medium type to a different medium type. If you add a new medium in this field, that medium will then appear in the **Medium** drop-down menu. This field is keyworded and used for selections and sorts. This is a required field.

25. Magnetic Medium

Check this box if the medium of this item is magnetic to prevent your security hardware from erasing the data on this item.

Subjects Subtab:

26. Subjects

This tab offers the ability to select the appropriate subject MARC tags. Enter desired subjects using the Add (+) icon and the **Actions** icon at the bottom of the **Subjects** pane. The topical (_a) field is required when a subject exists. Here are examples of subjects and the fields in which they should appear:

Costume — History — 1861-1865, Civil War — Georgia

_a — Topical (Example: Costume)

_x — General (Example: History)

_y — Chronological (Example: 1861-1865, Civil War)

_z — Geographic (Example: Georgia)

- For further MARC information, see the Library of Congress web page at <http://www.loc.gov/marc/>.

Categories Tab:

27. Bibliography

Use this field for local lists — reading lists for various classes, new items, etc. This field is keyworded.

28. Curriculum

Use this field is for local classes or units that use the item. This field is keyworded.

29. Interest Code

Use this field for the ages or grade levels where these items are appropriate reading material. In order to be searchable, any terms must be at least 2 characters long (i.e. grade 01, grade 02, Level 3.4 etc.) This field is keyworded.

Notes Tab:

30. Content Notes

Enter the names of titles and authors included in an anthology or compilation. This field is keyworded in the **All Words** index.

31. General Notes

This field is usually used for information such as "Includes index and bibliography." This field is also keyworded in the **All Words** index.

32. Award Notes

Use this field to enter notes as to awards associated with the item. (i.e. Utah Children's Book Awards, 2010 or Caldecott Award, 2009). This information is stored in the 586 tag.

Summary Tab:

33. Summary

The summary, abstract or annotation of this title — what this item is about written in one to three sentences — belongs here.

34. Statistics Tab

The title statistics tab shows the number of copies and how many are available, lifetime checkouts, last use date, accession date, and first use date.

35. Links Tab

Drag and drop OR click and type to add URLs. Double click on any attachment to edit the description. Links show on the **Item Details** window, **Circulation**, and **Items** management window. When a user clicks on an attachment in any Item Details window, the helper application indicated in your system will launch and display that attachment. The description in this field is keyworded in the All Words index.

Web URL's may be imported when they are in the 856 tag.

36. Study Programs Tab

Choose the appropriate study program that your library or organization is using. Alexandria is preconfigured to work with Accelerated Reader and reading Counts. Others can be added.

Copies Information Tab

Copy Info Tab:

37. Browse By

This drop-down menu enables you to select the browse order for viewing the copies.

38. Barcode

This is the unique identifier for the copy. Alexandria automatically enters the next available barcode based upon what has been entered in your **System Preferences**; however, you may change the barcode as desired. This is a required field for a copy.

39. Copy ID

The **Copy ID** is what is usually called the copy number. Alexandria will automatically fill in this field.

The call number, policy and volume are duplicated on both the title and the copies. Each copy will inherit this information and changes to it from the title so that the librarian will not have to enter it or change it manually for each copy. The copies, however, can be changed individually to something different. Once a copy has been changed to differ from the title in any of these fields, it will always be labeled as different for that field. This means that changes to the same field for that title will never affect the changed copy. Use this feature when most copies circulate, but one copy is reference. Give that one copy a reference call number and policy.

40. Volume

If there is a volume associated with the copy, enter the information in this field.

Since volumes are not keyworded, do not use copy volumes for subtitles of volumed sets (i.e. The *Encyclopedia of Mammals* may have *Aardvark to Cheetah* as its subtitle and not have a designated volume number. Do not put "Aardvark to Cheetah" in the copy volume — put 1 in the volume of the title and enter the volume designations as contents notes.

41. Call

The call number field for the copy will automatically be entered in this field; however, since you may have copies with different call numbers and policies from the item (title) call number, you may enter the appropriate call number in this field.

42. Serial

This field is for recording the serial number for a piece of equipment

43. Policy

The policy drop-down menu for the copy will automatically be set; however, since you may have copies with different policies from the item (title) policy, you may select the appropriate policy for the copy.

44. Condition

If you want to use condition codes for your items, then set the drop-down menu to indicate the correct **Condition Code** for your item. If not, leave it set to **Unknown**.

45. Vendor

If you wish to track the source of an item, enter the vendor's name in this field.

46. Accession Date

This field is automatically filled in to show the date the item was added to your database. If you wish to change the date to more accurately reflect when the item was received rather than added to your collection, you may change the date.

47. Last Library

In a Central Union system where items are shared amongst the libraries, this field indicates where the item was “seen” last.

48. Change Status

This drop-down menu will allow you to change the status of a copy to one of the **System Patrons** (i.e. **Lost**, **Discarded**, **On Repair**, etc.). The change in status will not be reflected until the record is saved. If an item is checked out, you will not be able to change the status using this menu.

49. Copy Site

This field is to designate your library and should match the **Site ID Code** field in the **Site Information System Preferences**.

50. Copy Location

While this field is not required, it can be helpful to use this field if your library has more than one floor or has more than one room.

51. Copy Shelving

Use this field, if desired, to indicate the collection to which the item belongs.

52. Purchase Cost

Record the cost of the item in this field, if desired.

53. Replacement Cost

This field is used to indicate what it will cost to replace this copy. Be sure to consider processing, shipping, cataloging costs and inflation.

54. Funding Source

This field is used to indicate the budget or source for the funding for this item. You may enter such notations as Donation, PTA, Birthday Book, or Book Budget 2010.

55. Inventory Date

This date indicates when the item was last inventoried. Remember that Alexandria changes this date whenever the item is checked out, checked in, or inventoried.

56. Security Device

If you are using a security device such as Whisper-Tape, select the appropriate type from the drop-down window.

57. Desensitize

This option is for self-service terminals. When this box is checked, the self-service terminals will desensitize the indicated security tag on checkout and resensitize it upon checkin.

58. Don't Show in Researcher

There are times when you may not want a copy to show in the Researcher, but you do want the title to show. For instance, if you have a circulating copy of a title and a classroom set.

You would not want the classroom set to show, but you do want patrons to be able to see that you have a copy that may be checked out. In that case, you would check this box for any copy that you do not want to show.

Copy Notes Tab:

59. Copy Notes

Use this field to record notes specific to this copy but not specific to the item. For instance, damage notes, recording when an item was lost and by whom.

60. Alert Notes

Alert Notes are those notes that are shown in a dialog window any time the item is checked in or out. Use this field to indicate such things as "CD in Librarian's Office."

61. Copy Stats Tab

This tab shows the circulation history for the item including the number of checkouts, days in circulation, last use date, present status, and the last six checkouts.

62. Transit History Tab

For Central Union systems, the **Transit History** tab is used to record the movement of the item between libraries in the system. The library of origin, destination and date and time are shown as well as the description of the type of transit activity that the entry represents.

B. Finding Items

1. Find *The 7 Habits of Highly Effective Teens*.

To find an item record:

- Go to **Show** on the menu bar and choose **Items** from the drop-down menu.
- Click either the **Find** icon or the **Actions** icon at the bottom-left of the window. The **Item Selection** window will open.

- Enter your search information and click on **Search** in the bottom-right corner of the **Search** window.

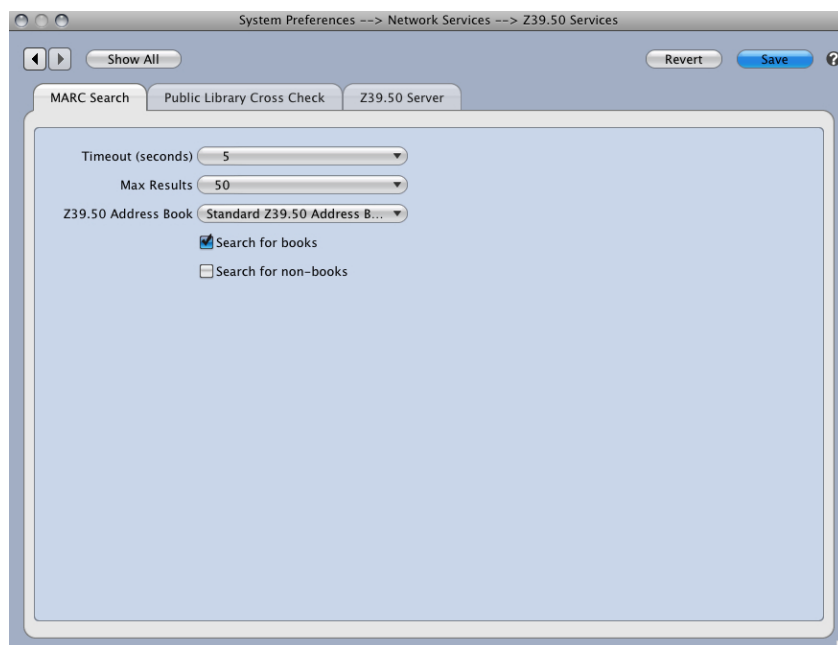
OR

- Click on the **Actions** icon in the bottom-left corner of the window and select either **Advanced Title Search** or **Advanced Copy Search**. Then, enter search text and click on **Search**.
- Your results will be listed in the left pane of the **Items** management window.

C. Title Assistant/MARC Search

First, you must go to the **System Preferences** to set your **MARC Search** options and to select the z39.50 servers that you want to search.

To set MARC Search preferences:

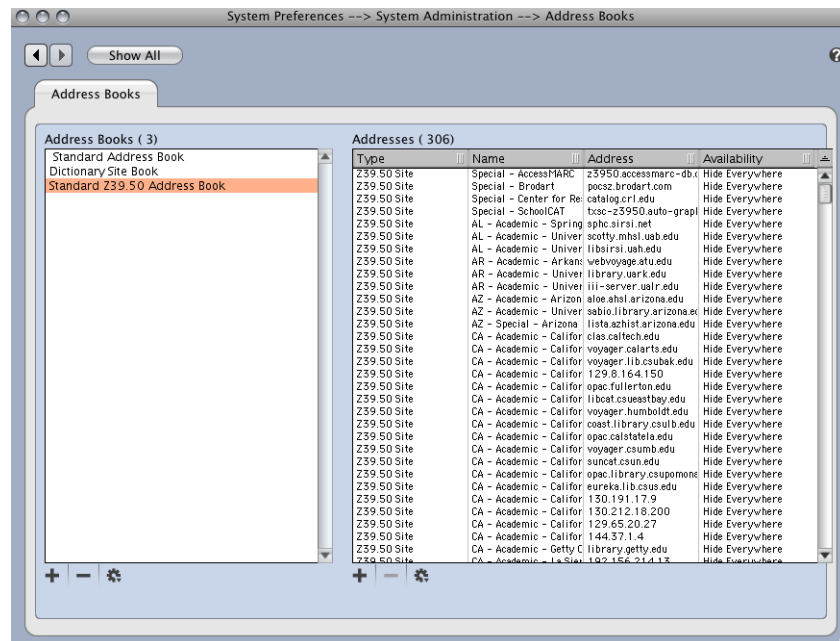


- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **z39.50 Services** in the **Network Services** category of the **System Preferences** window.
- Set the **Timeout** drop-down menu to the amount of time you want. (5 seconds really is sufficient!)
- Set the **Max Results** drop-down menu to the desired number. (50 is usually more than sufficient.)
- If you are not going to be searching for non-book items, take the check mark out of that box.
- Click on **Save** in the upper-right corner of the window.

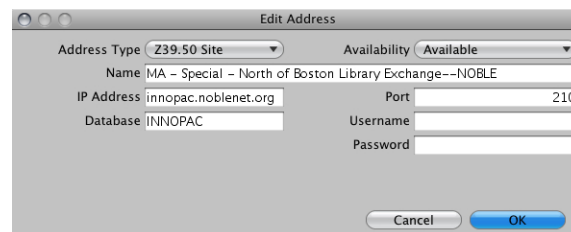
To select z39.50 addresses to search:

- Go to **Edit** on the menu bar and select **System Preferences**.

- Click on the **Address Books** in the **System Administration** category of the **System Preferences**, then click on **Standard z39.50 Address Book** in the left pane of the window.



- Double click on the server you want to activate and the **Edit Address** window will open for that z39.50 address.



- Change the **Availability** to **Available** (will be seen also in **Researcher**) or **Hide in Researcher** (only available for **Title Assistant**) using the drop-down menu and click on **OK**.
- Repeat the previous step until you have selected all the servers that you want. NOTE: There is a limit of 20!!!
- Click on **Save** in the upper-right corner of the window and close the **System Preferences** window.

2. Add the book, *Parallel Journeys* by Eleanor H. Ayer with one copy.

To catalog using Title Assistant:

- Go to **Show** on the menu bar and choose **Items** from the drop-down menu.
- Click on the **Add (+)** icon.

- Enter the **ISBN** or **Title** and press **<enter>**.

Alexandria will search your own database first and show any potential matches. Look at the titles shown and, if one is a match, highlight that title and click **Add Copy to Found Title**.

If there are no matches in your database, Alexandria will go directly to **MARC Search**.

- If none of the results from your database match the item for which you are searching, click the **MARC Search Results** button.
- Look at the results that are returned. Highlight the one that matches or best matches your item and click on **Save**.

Title	Medium	Score	Source
Parallel journeys/Eleanor H. Ayer with Helen Waterford and Alfor book		239.50	
Parallel journeys/by Eleanor H. Ayer with Helen Waterford and A. book		239.50	
Parallel journeys/Eleanor H. Ayer with Helen Waterford and Alfor book		239.50	
Parallel journeys/Eleanor H. Ayer with Helen Waterford and Alfor book		239.50	

Details

```

239.50: 199 - Academic - University of Virginia
LDR01587cam 2200397 a 4500^
001R99992^
080940810a1995 nyua j b 001 0ceng ^
010 _a94023277^
020 _a9699316300^
035 _a(Sirsi) c31009966^
035 _a(DLC)31009966^
040 _aDLC_cDLC^
043 _aeng--lan-us--^
049 _aVAB6^
050 _a31009966^
  
```

Character Set: Mac Standard (ASCII)

- Add the **Call Number** and select the **Policy** for the item.

Show the attendees that when they select a new title, Alexandria inserts a policy and medium type. These defaults are set in the **Items System Preferences**. Although **Title** is the only field that they must fill in for the item to be valid, they may want to fill in more information and change the policy and medium to something different.

Look at the **Policy** drop-down menu. Remind the users that policies govern who can check out this item, for how long, if fines accrue, or holds are allowed for this item. The only two policies that come with Alexandria are **Standard Item** and **System Item**. Any other policies must be created and entered in the **Policies System Preferences**.

Click on the **Medium** drop-down menu and show the users that they can add new mediums here. Alexandria only supplies the medium, **Book**. All other mediums must be added by the user or imported with their data. Mediums are pulled from the 245 _h field in the MARC record.

- Modify any fields that you wish to modify. When finished, click on the **Save** button in the upper-right corner of the window.
- You will be asked if you want to add a copy. If so, click **Yes** and fill in the fields on the **Copy** window. Click **Save** when finished on both the **Copy** window and the **Item** record window.
- When all copies have been added, click on **Save** in the upper-right corner of the **Item** window.

D. Cataloging a Website

Adding websites which meet the needs of your patrons is a very inexpensive way to increase the resources available to your patrons. When a patron selects the website item in **Researcher**, there is a link at the bottom of the item record that when it is clicked will launch an internet browser and go to the website.

3. You have found a wonderful website on Japanese-American internment camps that you want to your database.

To catalog a website:

- go to **Show** on the menu bar and select **Items** from the drop-down menu.
- Click on the **Actions** (gear) icon at the bottom of the left pane and select **New Record (Manually)** from the drop-down menu.
- Enter the name of the website in the **Title** field, change the policy to **Web** and the medium to **URL**.
- Enter any other information that you desire on the **Title Information** subtabs (**Publication**, **Subjects**, **Categories**, **Notes**, and **Summary**).
- Click on the **Links** tab and then click on the **Add (+)** icon at the bottom of this tab in the right pane of the window.
- In the **URL Attachment Definition** window, enter the name of the website in the **URL Name (Description)** field and type or paste the URL in the **URL Location** field (<http://www.asianamericanmedia.org/jainternment.html>). Then, click on **OK**.
- Click on **Save**.
- When asked if you want add a copy to the title, click on **No**.

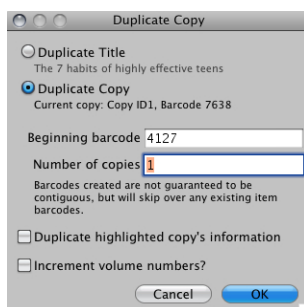
E. Duplicating Copies or Titles

The **Duplicate** feature enables the user to duplicate either the title or copies depending upon which tab has been selected on the record. This feature saves you time in adding multiple copies or when adding titles that are very similar (i.e. Encyclopedia Brown and the . . .).

NOTE: In a Central Union system, if the original item is at another library location, the **Security** level of the person using the Duplicate feature must allow them to perform this command on items with the holding site's code.

To duplicate copies:

- Open the item record in the **Items** management window.
- Unlock the **Item** record.
- Click on the **Copy Information** tab to duplicate a copy or click on the Title Information tab to duplicate the title.
- Click on **Actions** icon at the bottom of the left pane and select **Duplicate**.
- On the **Duplicate** window, **Duplicate Copy** should already be selected.



- Fill in the **Beginning Barcode** field and / or enter the number of additional copies you want to add in the **Number of Volumes** field.
- If duplicating copies, then check any of the boxes that you want to apply.
- Click **OK**.

F. Assigning Keywords from Circulation (V)

The **V** command enables you to quickly and easily add an entry for the same subject, bibliography, curriculum to multiple items.

To assign keyword using the **V** command:

- In the command line, type **V <space>** the letter code for the desired field (such as **B** for Bibliography, **C** for Curriculum, etc.) **<space>** and the text you want entered in that field (i.e. **V B 8th Grade English Reading List 2010**) and press **<enter>**.
- Scan the barcodes of the items to have this keyword(s) assigned.
- When finished, type a period (.) and press **<enter>**.

NOTE: Possible areas to use with this command are:

- A** — Awards
- B** — Bibliography
- C** — Curriculum
- I** — Interest/Reading Code
- S** — Subject
- R** — Study Program
- P** — Point Count
- T** — Test Number
- H** — Holding Code

G. Importing Items from a Vendor File

To import item records from a vendor file:

Item records may be imported into Alexandria in MARC, Microliff, or tab-delimited formats.

- Go to **Tools** on the menu bar and select **Import**. You may also drag a file from your desktop on top of Alexandria.
- Check the **Archive First** option checked on the **Status** tab..

- Click on the **Add** (+) icon under the **File** field in order to add a file to the list. If you dragged and dropped your file, then it should already be showing and you may skip the next step.

- Use the window that opens to find and select the file to be added. Highlight the file, then click on **Open** to add it to the list.
- Click on the **Item Settings** tab and set your selections for the options on this tab.
- Click on **Start** under the **File** field to begin the item import.
-

NOTES:

- Minimum fields for an item are **Title**, **Number of Non-filing Characters**, **Policy** and **Medium**. All fields except **Title** will have defaults supplied by the program. The only required field for a copy added to a title is **Barcode**.
- The **Title**, **Author** and **Series Editor Action** (gear) icons are in the bottom-right corner of the respective entry fields. Using these editors, you can easily enter multiple detailed fields and add new tags to any item's MARC record.
- Clicking the + icon brings up a selection of additional types of title tags that can be added to the item record.
- Clicking the **a** icon brings up fields that can be added to the selected tag. A field can be changed to another field designation by clicking on the letter of the subfield and typing the desired field indicator.
- The - icon removes a tag completely. Leaving a field blank removes that field when the record is saved. The **Q** icon allows for quick entry of secondary authors and subject headings; however, use this only when entering information in the **_a** field.
- On the **Subjects** tab and in the various editors, the **Up** and **Down Arrow** icons allow you to move from field to field in each tag.
- You cannot remove items that have copies checked out until they are declared lost or discarded.
- Since the MARC record is very particular, it is not recommended for the novice cataloger to use the **MARC Editor** when cataloging. All the fields on the simple Item management window are linked to specific MARC record tags. Modifying, adding or removing information from the simple fields will change the MARC record. A basic rule-of-thumb is that if you don't know a 245 from a 600 from a 740, then you should not use the **MARC Editor**.
- To learn more about MARC records, tags, and subfields, go to <http://www.loc.gov/marc> and click on Bibliographic, then select the desired tag.

7 Researcher (OPAC)

Estimated teaching time: 45 minutes

Choose **Researcher** from the Show menu. Alexandria automatically launches an internet browser which opens to the **Researcher**.

Although elementary and children's libraries may prefer the **Simple Search**, it is extremely limited and will only offer a brief overview. You should focus on the **Boolean** search instead since it contains features like **And**, **Or**, **And Not**, and **Through** searching, **WAN** searching and the **Browse** feature.

A. Types of Search Interfaces



a. Simple Search

1. Search Term Box

Enter the word or terms here.

2. Iconic Buttons

The icons are used to limit the search to specific indexes — **Author**, **Titles**, **Series**, **Subject**. In addition to these icons, additional icons have been provided — **Explore**, **Most Popular**, **What's New**, **Award Winners**, and **eBooks**. If your library has an A license or has an M license and has purchased **Explore** as an add-on, then you may customize the **Explore** search that this button controls as well as what other buttons are available in this area.

3. Help

Clicking on this button opens a document that will help the user learn how to search Alexandria.

4. Lists

This area to the left of the **Search** portion of the window contains the **Temp Basket**, **Past Searches** and **Past Items Lists**.

Temp Basket — This area is used to store the items from which you want to create a list.

Past Searches — Alexandria keeps a running record of past searches you have conducted so that you are able to revisit any of those searches that you have conducted.

Past Items — When you view an item's details, that item is then listed in the **Past Items** list so that you can easily view those items again.

5. netTrekker

This add-on allows patrons to search teacher-reviewed websites related to the topic being searched for.

6. SearchAll

SearchAll is the federated search add-on that is available for Alexandria.

7. Bulletin Board

Using the **Bulletin Board** feature, the librarian is able to post announcements or other information for patrons to view.

8. Vendor Links

The **Capstone Interactive** and **Pebble Go** links will only be shown if your library has ebooks from Capstone Interactive and if these vendor links have been activated.

b. Boolean Search

To switch to the **Boolean Search**, click on the toggle in the upper right corner of the main search field.

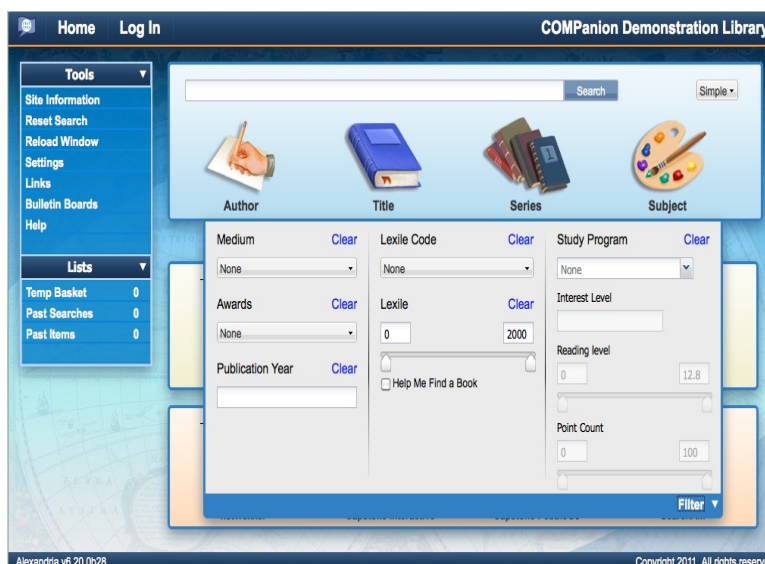
1. Search Selection Drop-Down Menus:

While the **Simple Search** is limited to **All Words**, **Author**, **Titles**, **Series** and **Subject**, many more options are available in **Boolean Search** by using the **Search Selection** drop-down menus — **Accession** (date added), **Awards**, **Barcodes**, **Bibliographies**, **Call Numbers**, **Curriculum Codes**, **Subject Keywords**, **Interest Code**, **ISBN-ISSN-LCCN**, **Location**, **Lexile Score**, **Medium**, **Publisher**, **Publication Year**, **Series** and **Shelving**.

2. Boolean Operators

Use the **Boolean Operators** drop-down menus to select the appropriate Boolean operator. Available **Boolean Operators** are: **And**, **And Not**, **Or** and **Through**.

B. Search Filters



Below the main search icons, is the **Search Filters** option. Clicking on this option expands the area to show the available search filters -- **Medium**, **Awards**, **Publication Year**, **Lexile**, and **Study Program** filters.

Medium — If only a particular type of medium is desired, then use this filter to select that specific medium.

Awards — From this drop-down menu, a patron may select an award category.

Publication Year — This filter is used to indicate a year of publication that is desired.

Lexile — Use the slider to select a **Lexile** to limit the search results.

Study Program — If you support a study program such as **Reading Counts** or **Accelerated Reader**, use the filters available in this area to set the **Study Program**, **Interest Level**, **Reading Level** and **Point Count** to apply to the search.

In the upper-right corner of the window is the **Sites** drop-down menu in library systems with multiple libraries.

C. Rules of Searching

The four rules of searching Alexandria are:

- Put a period at the end of the search term. Remember that the "period/dot" command says "I'm done, this is all I want, get me out of here." Alexandria is a "begins with search." Using the period makes it an exact match search.

Enter "cat" in the **Search** box and press **<enter>**. Notice the first title is *100 award-winning science fair projects*. When you click on Details and read through the summary, you notice the word "category." In the record for *A horse named Seabiscuit*, one of the author's is Cathy Dubowski. Again, the begins with search returned both these records because they contained words beginning with c-a-t.

1. Search for "cat."

- If you can't spell, use the **Browse** feature.

The **Browse** feature is helpful when you can't spell a word. Go to the **Boolean Search** by clicking on the toggle. Now type "civ" in the first **Search** field and click on the **Browse** icon. The **Browse** window opens to the first word beginning with c-i-v, find the word "civilization", highlight it and click on **Select**. Then press **<enter>** to perform the search.

2. A student can't spell civilization. Using Browse, enter civ.

3. Using Browse, search for "brown" -- All Words, Title, Author, etc.

- Two words typed in the same search field is the equivalent of a Boolean AND search with both words being exact match searches.

This particular feature makes it easy for patrons to conduct a Boolean "AND" search without having to understand how to use Boolean operators or having to remember to use the period (.) to make the words exact match. Simply type multiple words in the same **Search** field.

4. You want items about the Civil War.

- If you are combining Boolean AND and OR searches, the term that has to go with all (the AND search) goes last.

Boolean searches allow the person searching to narrow or expand the search easily. Multiple **Search** fields are provided and **Boolean Operator** drop-down menus are available for each additional **Search** field.

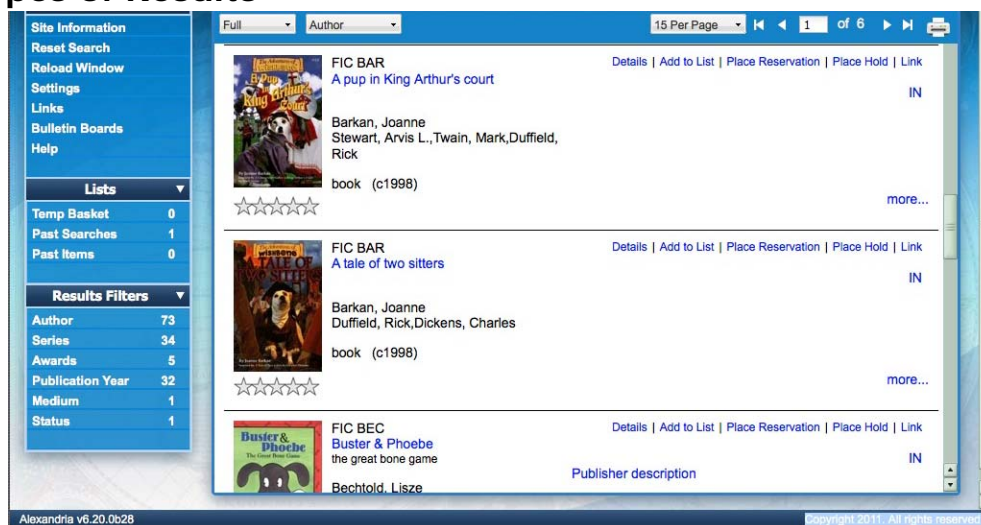
5. Search for items about Greek or Roman mythology.

To conduct a search:

- Enter search term(s) in the **Search** field.
- If you desire to use any filters, click on the **Search Filters** option and set the desired filters.
- Click on the appropriate search icon or just press **<enter>** to conduct an **All Words** search.

D. Results Screen

a. Types of Results



Notice that at the top of the **Search Results** page, the number of netTrekker results were found is shown if the library has subscribed to netTrekker. The number of results is shown below the search. Next is a drop-down menu that enables the patron to decide how many results will be shown per page and the page indicator is shown at the far right of the top of the page.

There are three types of **Search Results** — **Brief**, **Full** and **Cover Art** view. Both show the **Call Number**, **Medium**, and **Main Author**. **Lexile** and **Reading Level** are also displayed if these last two options have been checked in **System Preferences**.

While the **Brief** view allows more titles to be seen at one time, it also shows the number of copies available. If this link is clicked, it reveals to which library the copy or copies belong in a Central Union system.

The **Full** view gives the additional options of links to view the item **Details**, **Add to List**, **Place Reservation**, **Place Hold**, and **Link** and shows the **Status**, all **Authors**, **Medium** and **Publication Year**.

The **Cover Art** display looks like the items displayed as books on a shelf with the covers showing. A similar-looking display is found under the **Item Details** and is called **View on Shelf** which shows the item on the shelf but shows the cover art for the items that precede and follow it in shelf list order.

To return to the **Search** field page, the user merely clicks on **New Search**.

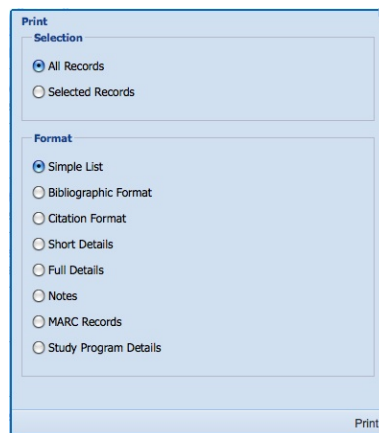
b. Ordering Results

The results may be shown in several different orders — **Title, Author, Call Number, Awards, Medium, Series, Year** and **Accession Date** — and the selection is made using the drop-down menu in the upper-left corner right above the first item entry.

c. Results Filters

Once the results of the search are displayed, the **Results Filters** options display in the left frame of the page. When a patron clicks on one of the **Results Filters**, the breakdown for the results based upon that filter are shown in its “window” and the patron may click on the desired result in that window to view the items that fit that criteria.

d. Printing Results



To print a record or records:

- Click on the **Printer** icon in the top-right corner of the window. The **Print** window will open.
- Decide whether you want all records printed or only the selected records and click on the appropriate radio button.
- Choose the **Format** in which the information should be printed.
- Click on **Run**.

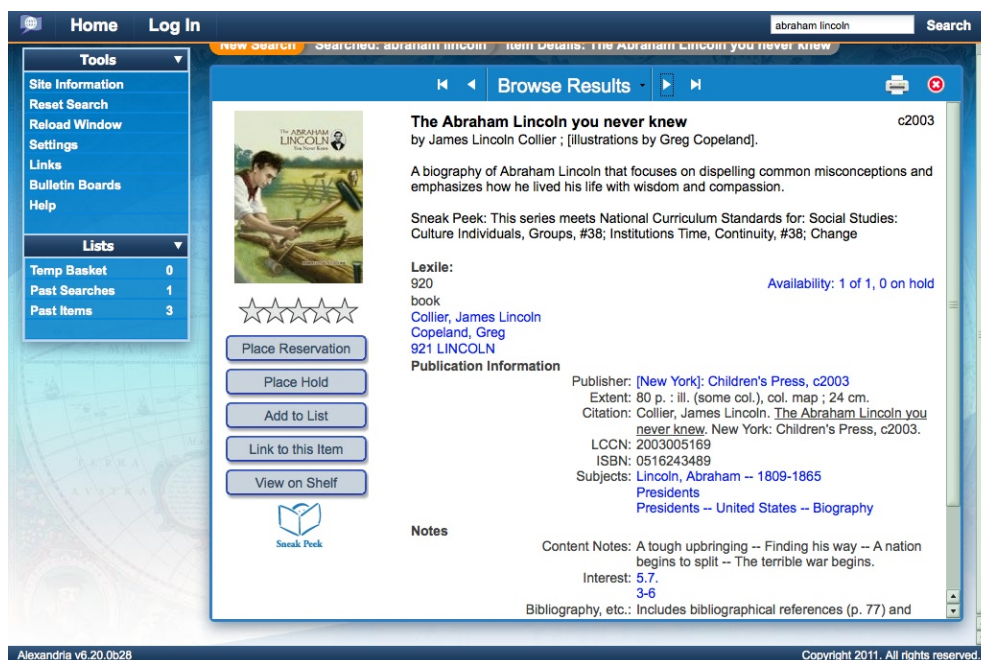
e. Temp Basket

The **Temp Basket** is a holding list for records that the patron wishes to save temporarily to a location so that at the end of the search, the list may be printed or just viewed. Items are added to this list by dragging and dropping them on the list's name or by clicking **Add to List** in **Full** or **Details Display**.

6. **Search for dogs. Using the Search Results List, select the first 5 titles, then select every other title from the remaining titles on the list. Add these items to the Temp Basket. Perform a new search for Cats and select 6 items to add to the Temp Basket.**

To pick items for the **Temp Basket**, click, drag and drop on the **Temp Basket**.

E. Item Record



When the patron selects an item by clicking on the title or on the **Details** link, the item details is shown in a scrolling display. The user may move from one item record to another by using the forward and back arrows at the ends of the scroll area.

Within the item record, notice that there are blue links. If the user clicks on one of these links, Alexandria will do the search for those areas.

To exit the **Item Details** view, click on the **X** in the upper-right corner of the window.

F. Reviews

a. Preference Settings:

- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **Security** in the **System Administration** category.
- Double click on a **Security Level** for which you want to set the ability to **Add**, **Edit** or **Remove** reviews.
- Set the **Reviews** drop-down menu as desired. Click on **Save**.
- Repeat for all **Security Levels**.
- Click on **Show All** button in the top-left corner of the window.
- Click on **Rules** in the **Circulation** category.

- Click on the **Rules** tab and check the box for **Enable Reviews** if you wish to allow patrons to review items.
- **Save** and, then, exit **System Preferences**.

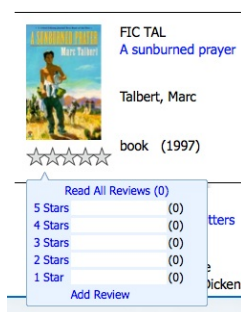
b. Patrons Management

- Click on **Show** on the menu bar and select **Patrons**.
- Note the check box in the lower-right corner, **Can Review Items**. if this option is checked, then that patron can review items.

7. Darla Anderson wants to put a review on *A Child Called It*. Username: 1001 Password: Anderson.

For a patron to add a review:

- Patron must log in in the **Researcher**.
- Perform search to locate title.
- Click on “**Stars**”, then, click on **Add Review**.

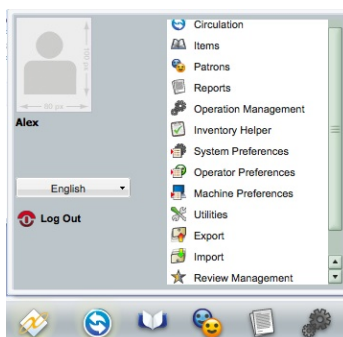


- Click on number of stars and fill in text for the review. Click on **Submit**.

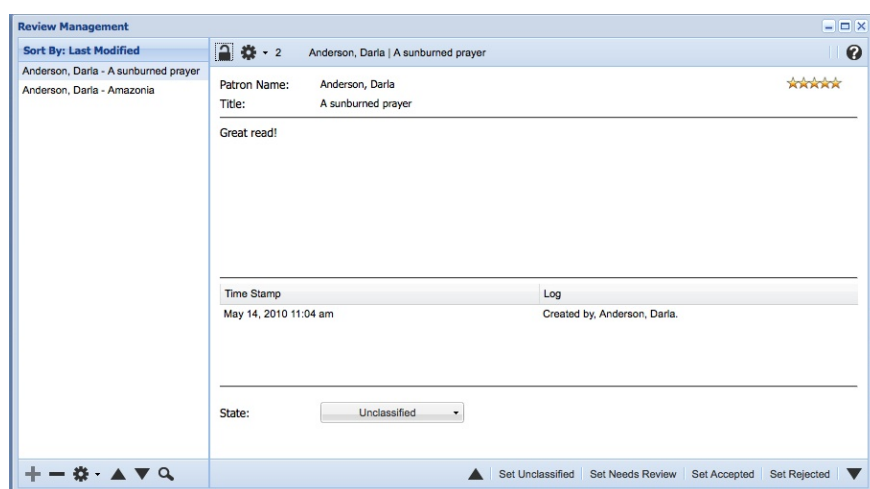
The screenshot shows the 'Add a review for this title' form. The form has a star rating system at the top, a text area for the review, and 'Submit' and 'Cancel' buttons at the bottom.

8. As the librarian, review Darla's review and decide whether to accept it or reject it.

- Log in as an operator in the **Web Librarian**. (Username: Alex Password: Alex)
- Click on the **Alexandria** symbol and select **Review Management**.

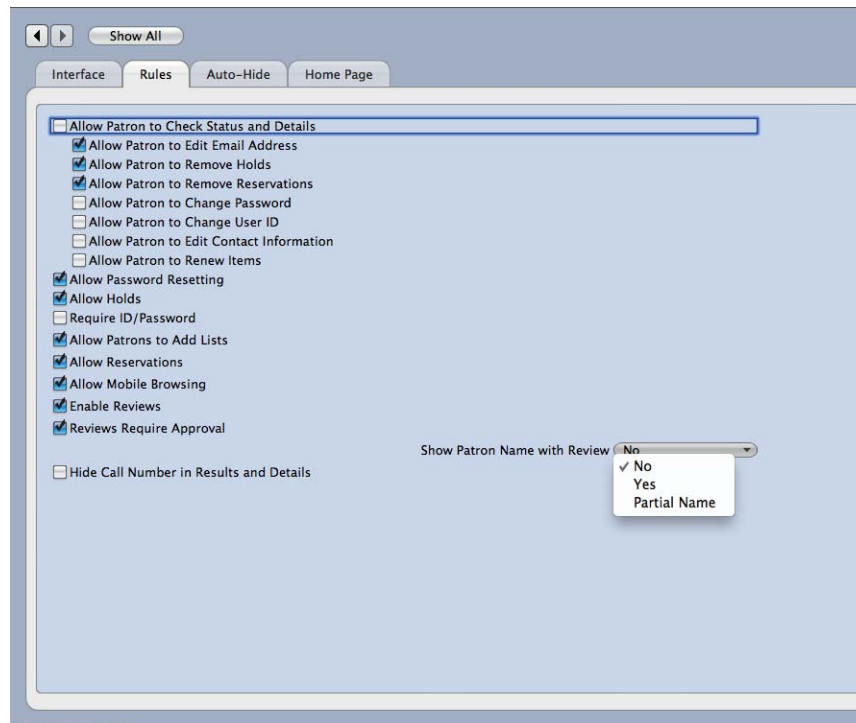


- Unlock the **Review Management** window, select the review, click on the desired action.



- Save.

G. Researcher Preferences



What the patron is able to do, what items can be seen based upon status, and what is seen in the **Researcher** are all determined by settings in the **Researcher Preferences** in the **Management** category of the **System Preferences**.

To set these preferences:

- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on the **Researcher** icon in the **Management** category.
- Working through all of the tabs, set your preferences for the **Researcher** as you desire.
- When finished, click on **Save** in the upper-right corner of the window.

NOTES:

- You can move between fields on a **Boolean** search using the **<tab>** key.
- You can change the **Boolean** operator for an **And** to an **Or**, **And Not**, or **Through** by clicking on the arrow in the field with the **And** operator and highlighting the operator of your choice.
- Use the **Through** operator to select a range of search terms such as authors starting with A - AD or call numbers 500 - 525.
- Holds and reservations may be made from the list in the **Full Results** view. When a **Brief Results** view list is generated, holds and reservations must be done from the **Item Details** window.

8 Reports

Estimated teaching time: 1 hour

Reports are divided into groups and are accessed by clicking on **Tools** on the menu bar and selecting **Reports**. On the **Reports** window, click on the category in the left frame which represents the type of report you want. Each category has subcategories that further divide the possible report types.

When the **Reports** window opens, the **Reports** tab is in focus in the main (right) frame. Note that there are two subtabs — **Reports** and **Saved**. The **Reports** tab lists all possible reports in the category and the **Saved** tab lists all reports that have been saved. Clicking on any of the listed reports will open the report editing tabs for that report.

Remember that reports print first to the screen, so you will waste no paper if the resulting report is not exactly what you want.

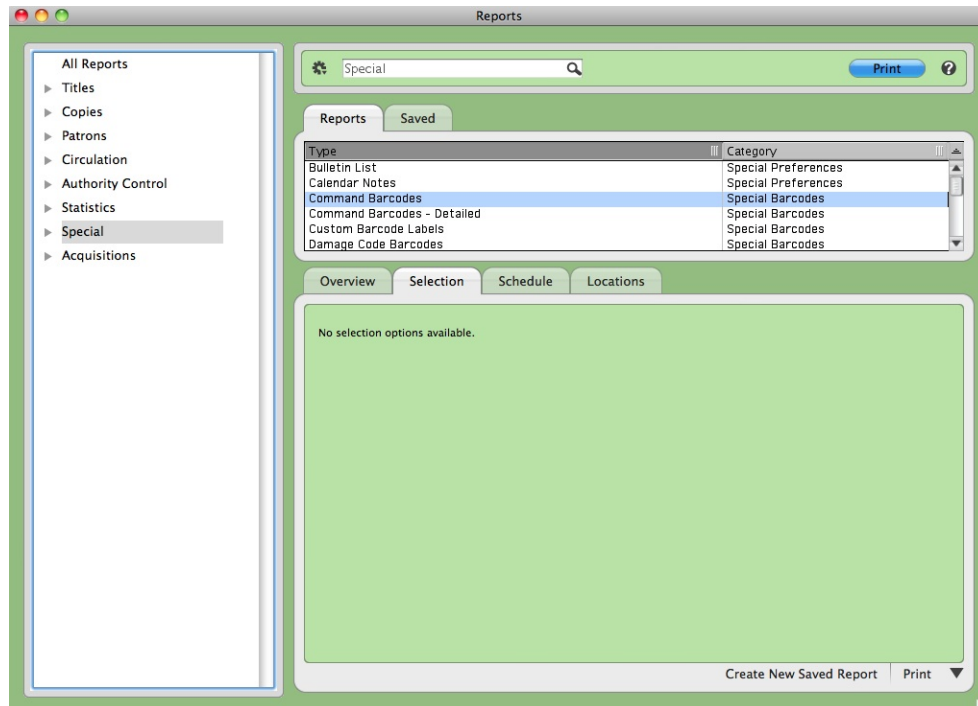
To set up a report:

- Go to **Tools** on the menu bar and select **Reports**.
- Click on the appropriate category in the left frame that represents the type of report you want.
- Click on the arrow before the category to reveal the subcategories for that category that represents the best choice for the report you want to generate.
- Click on report in the main (right) frame that fits your needs.
- If the **Format** drop-down menu appears for that report giving you a choice of formats, select the desired one.
- Select the **Sort By** option from that drop-down menu.
- If you want to narrow the results, from the **Select By** drop-down menu, select the first selection option. (If you are in a Central Union system, this should be **Site**, **Library**, or **School** depending on which option is listed.)
- If additional selection options are needed, click on the **Add Selection** button above the Boolean List field. Set the **Boolean Operator** drop-down menu as desired and change the **Select By** drop-down menu to your second selection choice. Repeat for as many selection options as you need for the report.
- Click on **Print** to print and the report will be generated in PDF format. To have the report generated in VWP format so that it is editable, click on the arrow following the **Print** button to have this option. To print a hard copy of the report, click on **File** on the menu bar and select **Print**.
- If the report generated meets your needs and you want to save it for use in the future, click on the **Overview** tab.
- Give the report a **Name**, **Description** and add **Notes**. Also, check the **Favorite** box if you want the report listed in your **Favorites**.
- Click on **Save**.

NOTE: We will cover the other tabs in the **Edit New Report** window later in this chapter.

With over 15,000 possible reports, it's impossible to talk about all of them. The reports highlighted in this chapter are those we feel will have the most value to libraries.

A. Special Reports



Special Reports are those reports that don't really fit into any of the other categories. The **Command Barcodes** is particularly useful because it make your circulation almost totally scanner driven. By printing a copy of this report, you will have a sheet of barcodes that represent many of the major circulation commands. Keep a copy of this report on your Circulation Desk in a plastic sheet protector so that you can just scan the appropriate command barcodes instead of having to type the commands.

B. Patron Reports

Patron Cards

The screenshot shows a web-based interface for configuring reports. On the left is a sidebar menu with categories: All Reports, Titles, Copies, Patrons, General, Forms (selected), Labels, Status, Usage, Lexile, Saved Lists, Circulation, Authority Control, Statistics, Special, and Acquisitions. The main area is titled 'Reports' and contains a search bar with 'Forms' entered. Below this are tabs for 'Reports' and 'Saved'. A table lists report types and their categories:

Type	Category
Patron Cards	Patron Forms
Patron Desk Reference	Patron Forms
Rolodex Cards	Patron Forms

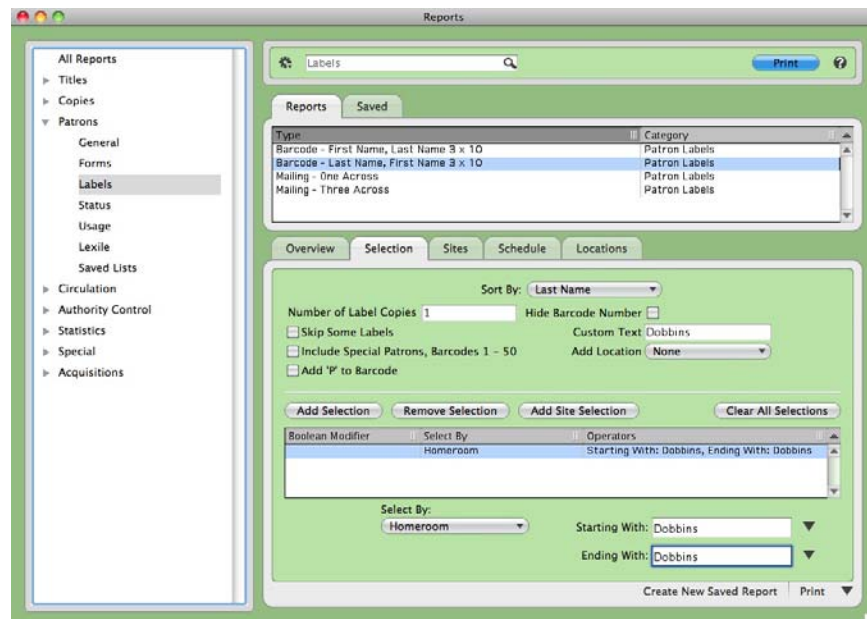
Below the table are tabs for 'Overview', 'Selection', 'Sites', 'Schedule', and 'Locations'. The 'Selection' tab is active, showing options to 'Include Patron Pictures' (checked), 'Show Patron's Birthday' (unchecked), and 'Hide Barcode Number' (unchecked). A 'Sort By' dropdown is set to 'Last Name'. Below these are buttons for 'Add Selection', 'Remove Selection', 'Add Site Selection', and 'Clear All Selections'. A table for selection criteria is shown:

Boolean Modifier	Select By	Operators
	All Active Patrons	

At the bottom of the 'Selection' tab is a 'Select By' dropdown set to 'All Active Patrons'. At the very bottom of the interface are buttons for 'Create New Saved Report' and 'Print'.

The **Patron Cards** report produces cards for your patrons complete with barcode and picture. The formatting should allow these cards to be printed on business card stock that has been pre-cut and is held together by tape. Realize that these need to be printed using a laser printer and will need to be laminated to keep the barcode from becoming unusable due to wear. You might want to try laminating some to see if the ink bleeds or stays fixed.

Patron Barcodes by Homeroom



This particular report works extremely well for elementary schools where a teacher has the same students all day. It does take a little longer to print this report one homeroom at a time, but the result is well worth it. No patron cards to deal with, you just keep these pages in a plastic protector sheets in a notebook and turn to the proper homeroom's sheet when the class comes in and just scan away. If a new student is added to the homeroom, just reprint the report.

To print this report:

- Go to **Tools** on the menu bar and select **Reports**.
- Click on the **Patrons** in the left frame, then, click on the arrow before **Patrons**.
- Click on the **Labels** subcategory.
- Click on the one of the barcode reports listed in the main (right) frame selecting one of the **Barcode** reports depending upon whether you want last name first or first name first.
- Select the **Sort By** option from that drop-down menu.
- From the **Select By** drop-down menu, select **Homeroom** and fill in the name of the homeroom in both the **Starting With** and **Ending With** fields. (If you are in a Central Union system, the first **Select By** should be **Site**, **Library**, or **School** depending on which option is listed.) Enter **Homeroom** name in the **Custom Text** field. Click on **Print** . . . or
- If the report generated meets your needs and you may want to save it for use in the future, click on the **Overview** tab.
- Give the report a **Name**, **Description** and add **Notes**. Also, check the **Favorite** box if you want the report listed in your **Favorites**.
- Click on **Create New Saved Report** and, then, click on **OK**.

C. Items Reports

Weeding List

The screenshot shows a software interface for configuring a 'Weeding List' report. On the left is a sidebar with a tree view of report categories: 'All Reports' (Titles, Copies, General, Inventory, Labels, Usage, Collection Analysis, Patrons, Circulation, Authority Control, Statistics, Special, Acquisitions). The 'Copies' category is expanded, and 'General' is selected. The main area has a search bar with 'General' and a 'Print' button. Below is a 'Reports' tab with a table of report types and categories. The 'Weeding List' report is selected. Below the table are tabs for 'Overview', 'Selection', 'Sites', 'Schedule', and 'Locations'. The 'Selection' tab is active, showing a 'Sort By' dropdown set to 'Copy Call Number'. Below this are buttons for 'Add Selection', 'Remove Selection', 'Add Site Selection', and 'Clear All Selections'. A table shows the current selection criteria: 'And' (Boolean Modifier), 'Copy Call Number' and 'Publication Year' (Select By), and 'Starting With: f/c a, Ending With: f/c z' and 'Starting Date: 1900, Ending Date: 1998' (Operators). At the bottom, there are 'Select By' dropdowns set to 'And' and 'Publication Year', and date fields for 'Starting Date: 1900' and 'Ending Date: 1998'. At the very bottom are buttons for 'Create New Saved Report' and 'Print'.

Type	Category
Copy List - Simple, with Barcodes	Copy
Copy List - Summary	Copy
Copy Status	Copy
Copy Status Details	Copy
Reordering Details	Copy
Weeding List	Copy

Boolean Modifier	Select By	Operators
And	Copy Call Number	Starting With: f/c a, Ending With: f/c z
	Publication Year	Starting Date: 1900, Ending Date: 1998

The **Weeding List** report is most helpful when you want to weed quickly and effectively. This report is found on the **Copies** category, then, under the **General** subcategory. In setting up this report, you will need to set two **Select By** options — **Copy Call Number** and **Publication Year**. The call number selection enables you to limit the items reported to a small portion of your library collection. Using publication year as one of the **Select By** options allows you to limit the items reported to those older than a certain year. Because the resulting report also shows the LTD (life-to-date) usage and last-use date, you will be able to identify those items that have never been used or that have not been used for a significant period of time.

Barcode Labels

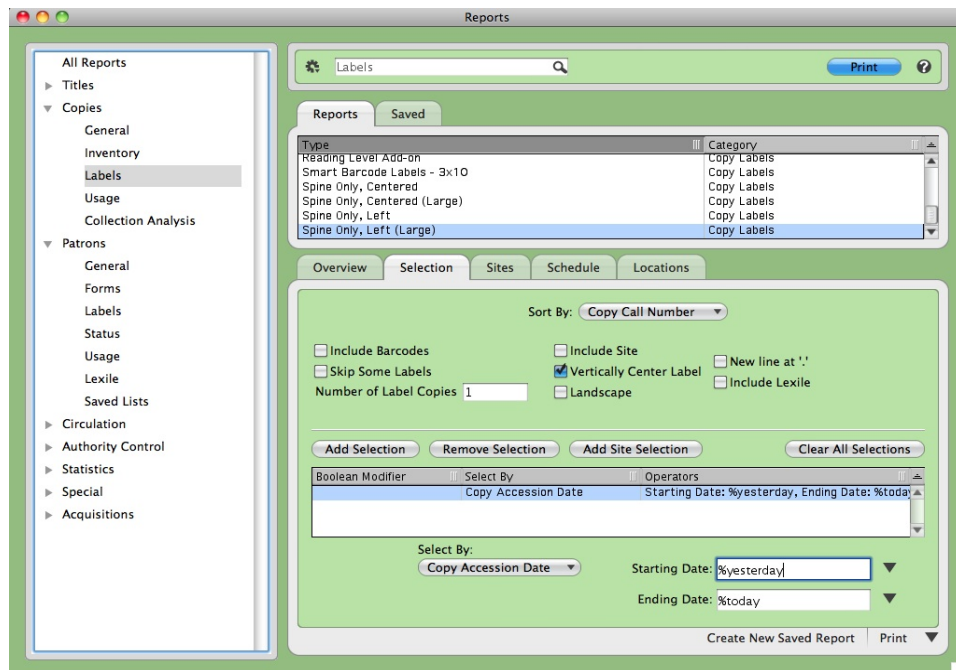
The screenshot shows the 'Barcode Labels' report configuration window. On the left is a sidebar with a tree view containing 'All Reports', 'Titles', 'Copies', 'General', 'Inventory', 'Labels' (selected), 'Usage', 'Collection Analysis', 'Patrons', 'Circulation', 'Authority Control', 'Statistics', 'Special', and 'Acquisitions'. The main area has a search bar with 'Labels' and a 'Print' button. Below this is a 'Reports' tab with a table of report types:

Type	Category
AR Spine Labels	Copy Labels
Barcode Labels - 2 line custom 3x10	Copy Labels
Barcode Laser Labels - 3x10	Copy Labels
Envelope and Spine, Center with Scannable Barcode	Copy Labels
Envelope and Spine, Centered	Copy Labels
Envelope and Spine, Left	Copy Labels

Below the table are tabs for 'Overview', 'Selection', 'Sites', 'Schedule', and 'Locations'. The 'Selection' tab is active, showing options to 'Include Author' (checked), 'Skip Some Labels' (unchecked), and 'Number of Label Copies' (1). There are buttons for 'Add Selection', 'Remove Selection', 'Add Site Selection', and 'Clear All Selections'. A table for 'Select By' shows 'Copy Accession Date' selected. At the bottom, there are 'Starting Date' and 'Ending Date' fields, and a 'Create New Saved Report' button.

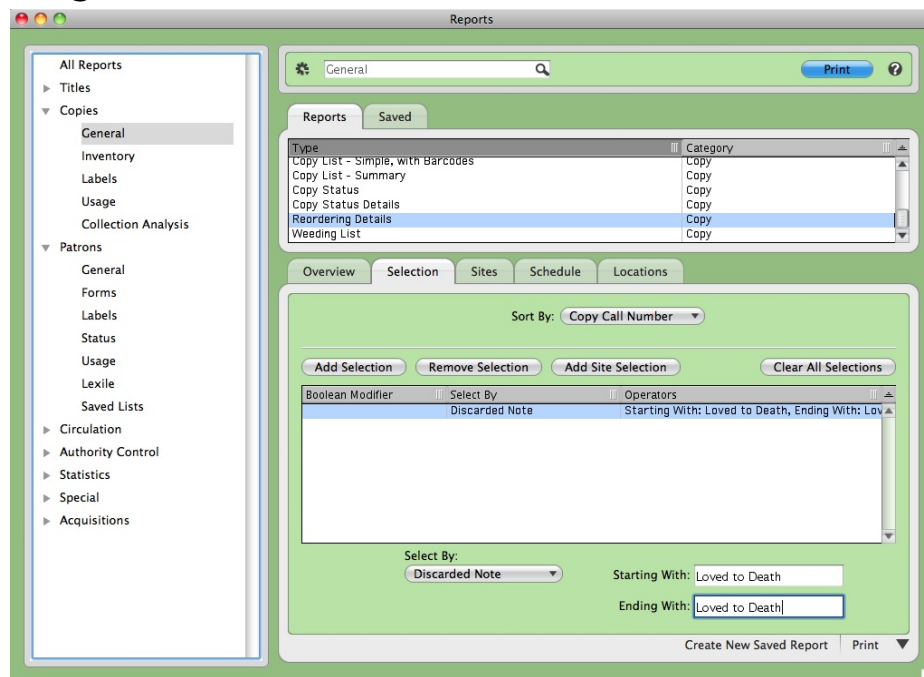
The **Barcode Labels** report allows you to print “smart” barcodes for the items in your collection. In this example, you will see how you can print the barcodes for items added to your collection during a particular period of time; however, realize that you are able to print replacement barcodes by using the **Select By** option, **Barcode List** and manually entering the barcode numbers for the barcodes that need to be made. Notice that you may use the **Skip Some Labels** option if you are going to print using a sheet of barcodes that has already been partially used.

Spine Labels



The other part of processing items is to print spine labels. This report is also found in the **Copies** category and the **Labels** subcategory. The rest of the setup is much the same as the **Barcode Labels** report.

Reordering Details



When you are discarding items and use detailed reasons in the **Discard** mode, this report enables you to print a list of items discarded for a specific reason such as **Worn Out**, **Outdated**, etc. which facilitates reordering those titles or replacing them with more current items

since the report not only gives the publication information but also the call number. Remember that you *must* print this report before you run the utility to completely remove the discarded items from your database. Notice that the **Select By** option used is **Discarded Note**, so remember to be consistent in the reasons you give for discarding items. This report is found in the **Copies** category under the **General** subcategory.

Top Circulated Items

The screenshot shows the 'Reports' application window. On the left is a sidebar with a tree view of report categories: All Reports, Titles (General, Publication Date Summary, Usage, Cards, Bibliography), Copies (General, Inventory, Labels, Usage, Collection Analysis), Patrons (General, Forms, Labels, Status, Usage, Lexile, Saved Lists), Circulation, Authority Control, Statistics, Special, and Acquisitions. The 'Usage' subcategory under 'Titles' is selected.

The main area has a search bar with 'Usage' and a 'Print' button. Below it are 'Reports' and 'Saved' tabs. A table lists report types and categories:

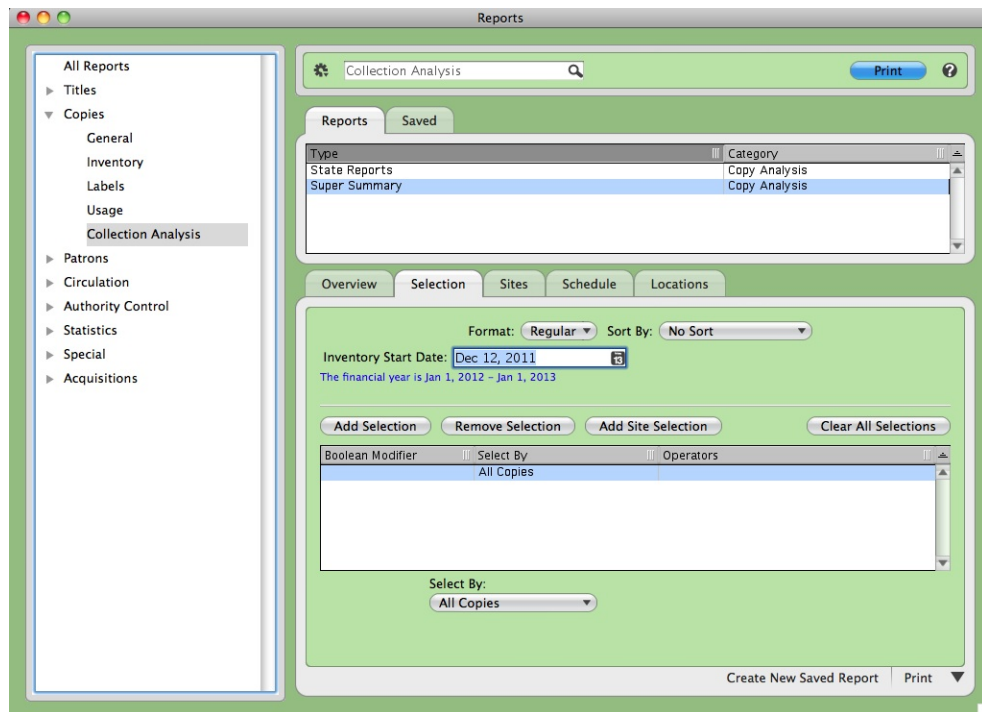
Type	Category
Lifetime Usage	Title Usage
Top Circulated Items	Title Usage
Year to Date Usage	Title Usage

Below the table are tabs for 'Overview', 'Selection', 'Sites', 'Schedule', and 'Locations'. The 'Selection' tab is active, showing configuration options:

- Sort By: Timeframe Usage
- Number of Titles: 20
- Starting Month: mm/yyyy
- Ending Month: mm/yyyy
- Buttons: Add Selection, Remove Selection, Add Site Selection, Clear All Selections
- A table for Boolean Modifier, Select By, and Operators. The 'Select By' dropdown is set to 'All Titles'.
- Buttons: Create New Saved Report, Print

The **Top Circulated Items** report is found in the **Titles** category under the **Usage** subcategory. You determine the number of results by setting the **Number of Titles** drop-down menu to the desired number. You will need to enter the **Starting Month** and **Ending Month** in the two-digit month and four-digit year format with a **/** between the two elements. If you want to limit the results to a particular area of your collection such as the fiction books, then use **Copy Call Number** as the **Select By** selection.

Super Summary

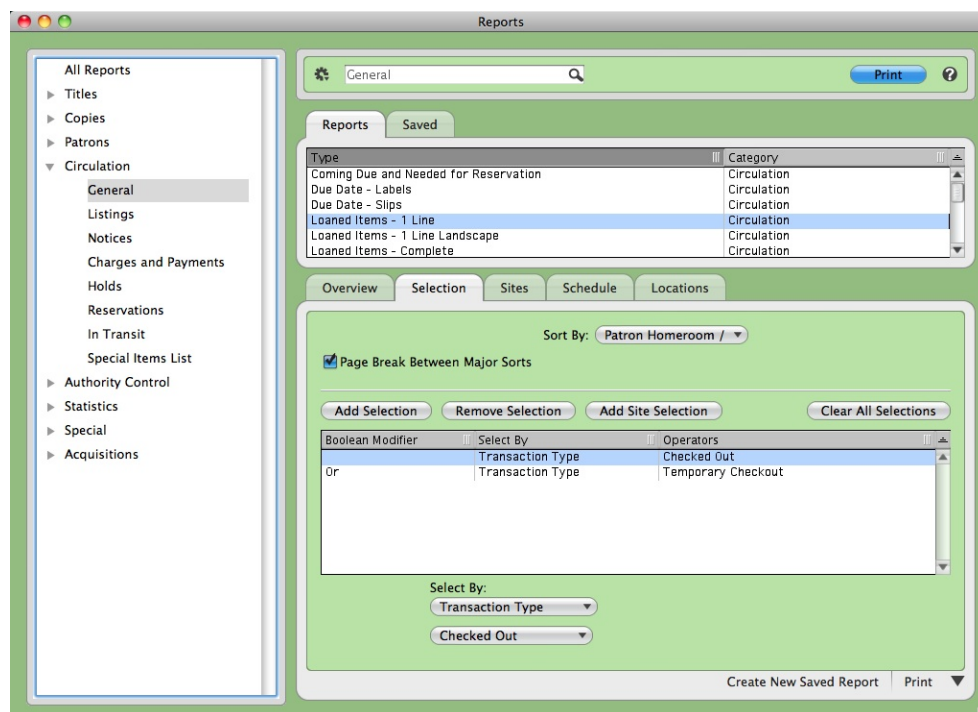


The **Super Summary** reports are part of the **Copies** category under the **Collection Analysis** subcategory. There are many formats for this report, so be aware of what the simple statement “**Ignore Super Summary Call Numbers**” means in the **Format** options. If you have non-standard call number prefixes (i.e. BB for Big Books, CR for Circulating Reference), using a format that states **Ignore Super Summary Call Numbers** will cause the report to show these call number groups. If you choose a format without this option, then these non-standard call numbered items will be lumped together under a category called **Other**.

This report looks at your items from three different aspects -- numbers, age, and usage. It then reports that information based upon call number groups, item policies, and by medium type. This information can be very helpful in determining where you have been ordering, how many items (titles and copies) in each category, where you need to order, where you need to weed most and what areas of your collection are being used and how much.

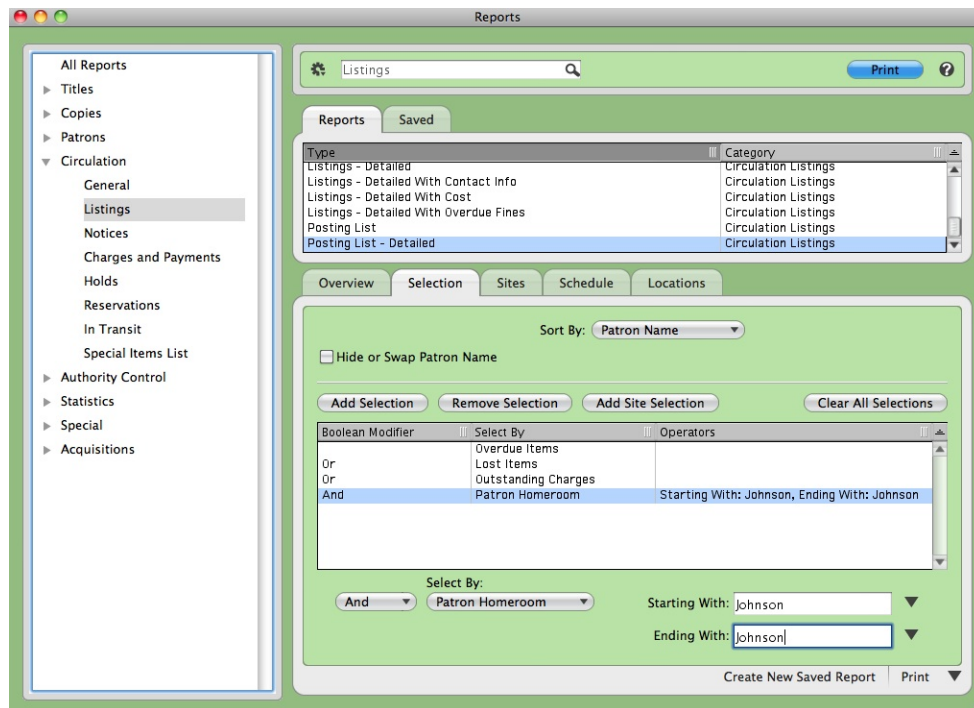
D. Circulation Reports

Loaned Items



The **Loaned Items** report has several uses. Perhaps, you have a teacher that wants a list of the items checked out to her class to make certain that each child has a book to read. A more standard use for this report, however, is to run it at the end of the school year just before your **Period Due** date in order to remind the students what items they have checked out and must return on or before that date. This report is found in the **Circulation** category under the **General** subcategory.

Circulation Posting List — Detailed



The **Circulation Posting List — Detailed** is a wonderful report to send to teachers to inform them and to let them inform their students of overdue items, fines and fees. It is found in the **Circulation** category under the **Listings** subcategory.

With the new feature in available starting with version 6.0.0 that allows you to schedule reports and send them as email attachments, setting up this report to be sent out automatically makes management of overdue notifications to teachers so simple. Yes, it will take a little bit of time initially, but the rewards will be endless.

After the initial report has been set up, let's add the **Select By** option of **Homeroom** and enter a homeroom in the **Starting With** and **Ending With** fields. For this example, we will enter Johnson in both of these fields.

- If you are part of a Central Union system, select your library from the **Available Sites** list on the **Sites** tab and use the > to **Selected Sites** list.
- Go to the **Schedule** tab and fill in the date that you want the report to run next, then, set the **Time** drop-down menus. We suggest that you set this for a time of day early in the

morning so that it will be there when the school day begins and the teacher checks his or her email.

The screenshot shows the 'Reports' window with the 'Listings' report selected. The 'Repeat' dropdown is set to 'Weekly' and the 'Every' field is set to '1'. The 'Send Email Notification' checkbox is checked, and the email address 'johndoe@companioncorp.com,janedoe@companioncorp.com' is entered in the 'Send Email Notification To' field. The 'Locations' tab is selected at the bottom.

- Set the **Repeat** drop-down menu to **Weekly** and click on the **Day** of the week for it to run and set the **Every** field to 1.
- Check the **Send Email Notification** box and fill in your email address in the field provided.
- Click on the **Locations** tab and set the **Output to** drop-down menu to **Email Attachment** and fill in the email address of the teacher. You may send the report to more than one person, just separate the email addresses with a comma. (We suggest that you send a copy to yourself.) If a user name and password are necessary in order to send the email, enter those things in the fields provided.

The screenshot shows the 'Reports' window with the 'Listings' report selected. The 'Output' dropdown is set to 'Send as attachment in email' and the email address 'johndoe@companioncorp.com,janedoe@companioncorp.com' is entered in the 'Output' field. The 'Output Format' dropdown is set to 'PDF' and the 'Output Filename' field is set to 'Weekly Overdues'. The 'Append Output Prefix' and 'Append Output Suffix' dropdowns are both set to 'None'. The 'Locations' tab is selected at the bottom.

- Set the **Output Format** drop-down menu to **PDF** and give it a name such as *Johnson Overdues*. Set the **Append Prefix** to **Date** if you want the file dated.
- Click on the **Overview** tab and fill in a **Name**, **Description** and **Notes** (i.e. Weekly Overdues for Johnson's class, PDF sent by email on Fridays at 4 a.m). Check **Favorite** if you want the report as a favorite.
- Click on **Save**.

Circulation Letters to Parents

The screenshot shows the 'Reports' window with a sidebar on the left containing a tree view of report categories: All Reports, Titles, Copies, Patrons, Circulation (selected), General, Listings, Notices (selected), Charges and Payments, Holds, Reservations, In Transit, Special Items List, Authority Control, Statistics, and Acquisitions.

The main area is titled 'Reports' and has a search bar for 'Notices'. Below it, a table lists report types and categories:

Type	Category
Circulation Letter	Circulation Notice
Circulation Letter to Parents	Circulation Notice
Circulation Letter with Summary	Circulation Notice
Circulation Notice - 2 Per Page	Circulation Notice
Circulation Notice - 4 Per Page	Circulation Notice
Circulation Notice - Detailed	Circulation Notice

Below the table are tabs for 'Overview', 'Selection', 'Sites', 'Schedule', and 'Locations'. The 'Overview' tab is active, showing a 'Sort By' dropdown set to 'Patron Name'. There are checkboxes for 'Calculate Overdue Fines', 'Show Replacement Cost', 'Show Patron's Barcode', 'Show Patron's Locations', 'Print item images', and 'Print Letterhead'. A 'Top Margin' field is set to 36. A 'Letter Text' field contains the text: 'The following items require your attention. Please contact the library as soon as possible.'

At the bottom, there are buttons for 'Add Selection', 'Remove Selection', 'Add Site Selection', and 'Clear All Selections'. Below these is a table for 'Boolean Modifier', 'Select By', and 'Operators':

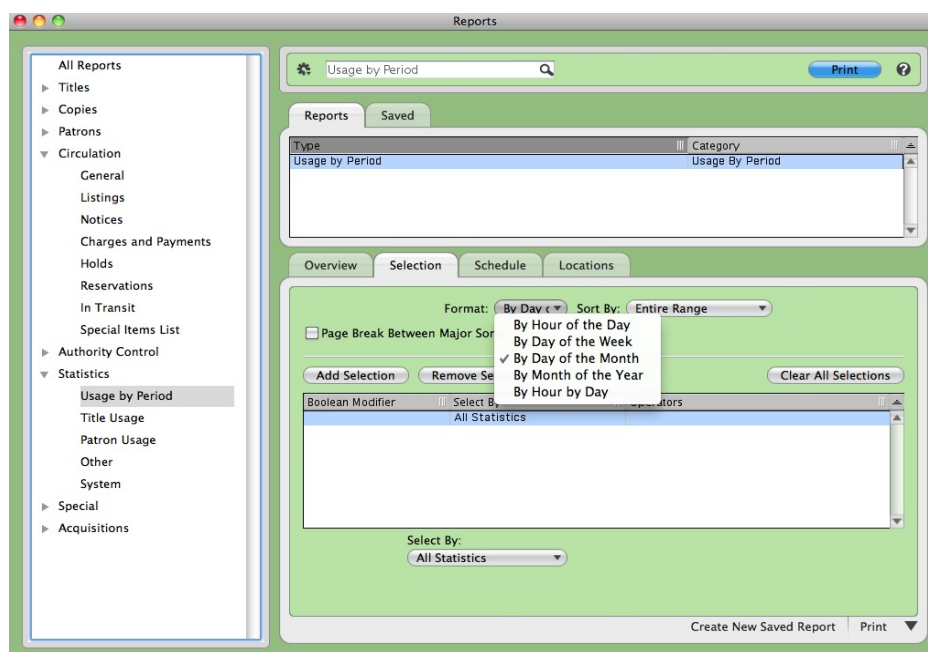
Boolean Modifier	Select By	Operators
	Overdue Items	

A 'Select By' dropdown is set to 'Overdue Items'. At the bottom right, there are buttons for 'Create New Saved Report' and 'Print'.

When an item is more than a certain number of days overdue, you may wish to notify the parents. This is easily accomplished by using the **Circulation Letters to Parents**. This report is found under the **Circulation** category and the **Notices** subcategory. The check boxes allow you to determine what information is to be included in the report. If you are going to send these to the parents' emails, you might want to include the **Patron's Barcode** so that you will be able to help parents know which child has the overdue if they have more than one child in the school.

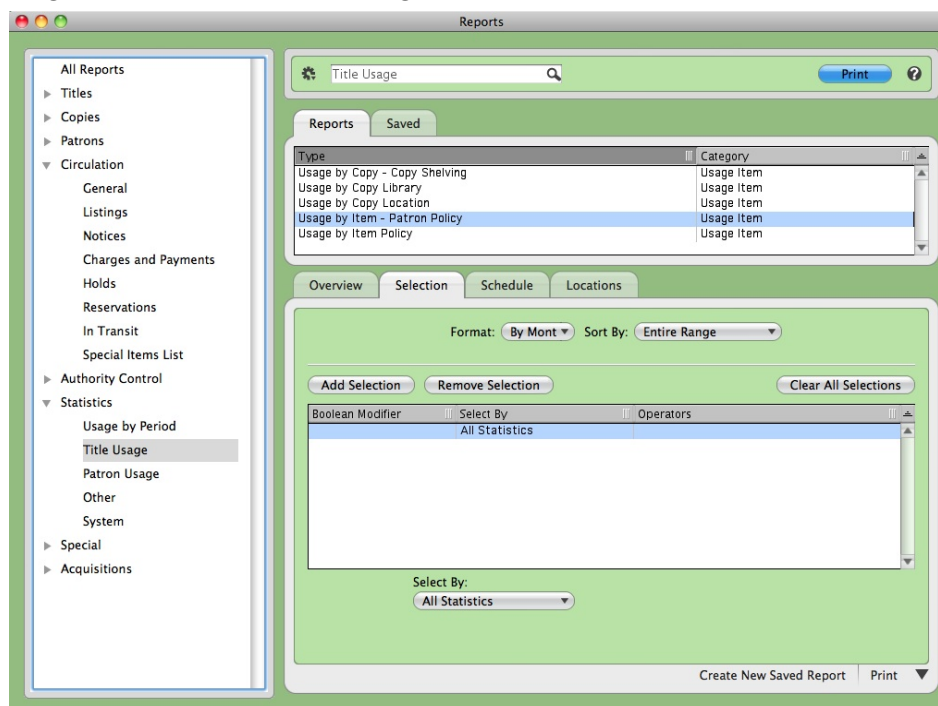
E. Statistics Reports

Usage by Period



The Usage by Period provides information on how many items were checked out, checked in, renewed, and how many holds were placed during the period of time selected. Use the **Select By** option of **Date Range** and fill in the **Starting Date** and **Ending Date** for the period.

Usage by Item-Patron Policy



Perhaps the most informative report of all is the **Usage by Item-Patron Policy**. This report is also found on the **Statistics** category under the **Item Usage** subcategory. When you look at this report, you will either see very unimpressive information if you have only used **Standard Patron** policy and **Standard Item** policy; however, if you have established detailed policies for both patrons and items, you will be able to tell who is reading what and how much. For instance, if there are separate policies for each grade in the school even if you have the exact same rules for all grades, you are then able to see statistics for each grade. You might want to have simple item policies such as Fiction, Non-Fiction, Reference, and Easy or you might want to have more detailed item policies such as 000s, 100s, 200s, etc. instead of Non-Fiction. Imagine how informative it would be to see that your 000s were not being read by anyone or that 7th graders were reading many biographies while 8th graders (who are required by state standards to have a biography unit in Language Arts) have not read any biographies. What you get is dependent upon what policies you have established.

NOTES:

9 Policies and Preferences

Estimated teaching time: 30 minutes to 2 hours

Since preferences are a strongly personal area and may provide endless variety of options and combinations, only a few of the major areas are covered in this manual. Refer to the *Getting Started Guide* for more detail on other preferences. Be prepared to adjust your training to answer the questions of the attendees or to cover areas that are not mentioned here, but are appropriate to their situation.

To access policies and other preferences, choose **System Preferences** from the **Edit** drop-down menu. Only **System Preferences** will be discussed in this chapter.

A. Site Information, Email, Security, Operators.

Be certain to fill in the library's name, address, **Site ID Code**, language setting and email settings. (The email settings must be entered in order to email Technical Support from within Alexandria and to email notifications to the patrons.)

Security preferences determine what can and can not be done when using Alexandria for those persons with the specific security level.

In **Operators**, operators are assigned a personal login and password as well as a security level. Each operator that logs on will be listed in the **Transaction Log**. At least one library administrator and one Researcher login should be created for security purposes.

Remember that the **Data Station** must be running in order for people to search. If the patrons have access to the **Data station** when the librarian is not present in the library, they should restart Alexandria and log in as a **Researcher** so that people may only search and may not add, remove, or modify patrons, items, or transactions.

None of these take effect until **Require Operators to log in** is checked and Alexandria is restarted.

B. Policies (Patrons, Items, Exceptions) and Call Number Policy Mapping

Policies govern how many items a patron can check out, how long they can be checked out and what the fines are, etc. A patron policy must be created for each patron group that differs in their circulation rules. (i.e. Staff have a different **Period Due Date** and longer checkout time). An item policy must be created for each item group that differs in their circulation rules (i.e. Reference does not check out while Fiction does.) Policies are also used in the **Usage Statistics** reports; so, even if there is no difference between the circulation rules, if you need statistics based upon time, patron or item, policies are the best way to obtain those statistics.

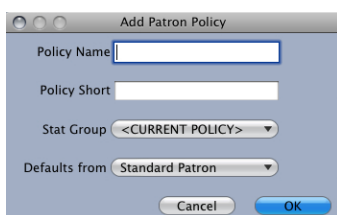
On the **Patrons** side, you would create and enter the general rules for each patron group. On the **Items** side, you create and enter the general rules for each item group (what applies for the majority of patrons using items with this policy. Clicking on the **Exceptions** button enables you to make exceptions for certain patron-item policy combinations. For example, Teachers may check out Reference items, but the majority of the patrons may not check out Reference items.

1. Set up a Patron Policy for 6th grade students with a Policy Code of S06.

To create a new policy:

- Click on **Edit** on the menu bar and select **System Preferences**.
- In the **Circulations** category, click on **Policies**. A **Patron Policy** is in the left pane and an **Item Policy** is in the right pane. Use the drop-down menus at the top-left and top-right to change to a different policy for that pane.
- Click on the **Add (+)** icon at the bottom of the side to which you want to add a policy.
- In the window that opens (**Add Patron Policy** or **Add Item Policy**)

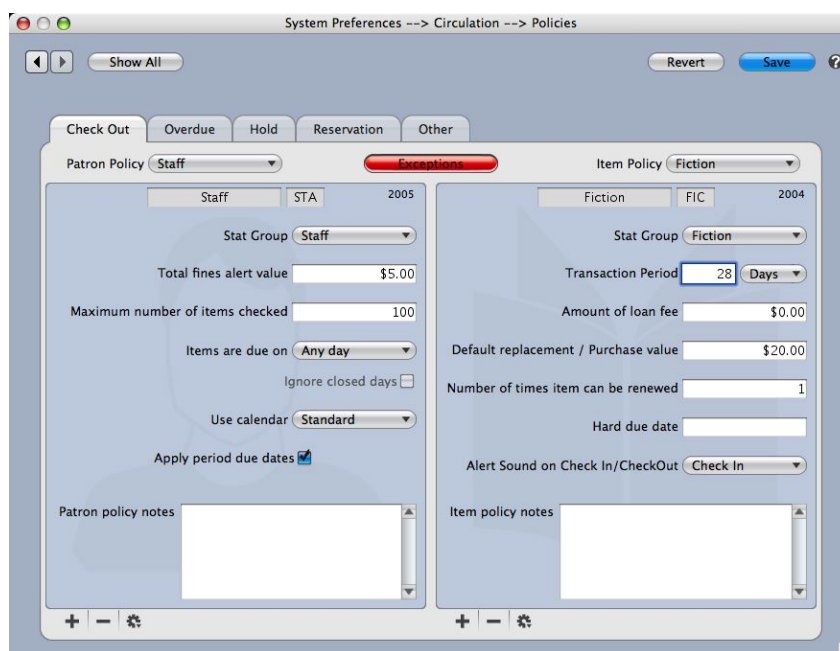
- Give the policy a **Policy Name** and a **Policy Short** code in the **Policy Name** field and the **Policy Short Code** field and click on **OK**.



A dialog box titled "Add Patron Policy" with the following fields and controls:

- Policy Name: [Text input field]
- Policy Short: [Text input field]
- Stat Group: [Dropdown menu showing "<CURRENT POLICY>"]
- Defaults from: [Dropdown menu showing "Standard Patron"]
- Buttons: Cancel, OK

- Work your way through each tab and the policy options on each tab making the selections you want.
 - When finished, click on the **Save** button in the upper-right corner of the window.
2. Give those persons on Staff policy a 28 days transaction period for items on Fiction policy, but limit them to only 4 items on that policy.



A screenshot of the "System Preferences -> Circulation -> Policies" window. The window has tabs for "Check Out", "Overdue", "Hold", "Reservation", and "Other". The "Exceptions" tab is selected and highlighted in red. The window is divided into two panes: "Patron Policy" on the left and "Item Policy" on the right.

Patron Policy (Left Pane):

- Patron Policy: Staff
- Stat Group: Staff
- Total fines alert value: \$5.00
- Maximum number of items checked: 100
- Items are due on: Any day
- Ignore closed days: [checkbox]
- Use calendar: Standard
- Apply period due dates: [checkbox]
- Patron policy notes: [Text area]

Item Policy (Right Pane):

- Item Policy: Fiction
- Stat Group: Fiction
- Transaction Period: 28 Days
- Amount of loan fee: \$0.00
- Default replacement / Purchase value: \$20.00
- Number of times item can be renewed: 1
- Hard due date: [Text field]
- Alert Sound on Check In/CheckOut: Check In
- Item policy notes: [Text area]

To make exceptions to the policy for a particular policy:

- Click on **Edit** on the menu bar and select **System Preferences**.
- In the **Circulations** category, click on **Policies**. A **Patron Policy** is in the left pane and an **Item Policy** is in the right pane. Use the drop-down menus at the top-left and top-right to change to a different policy for that pane. Have the patron policy for which the exceptions will be made showing in the left pane and an item policy to which exceptions will be made for that patron policy group showing in the right pane. (i.e. Staff on **Patron Policy** side and Fiction on the **Item Policy** side).
- Click on the **Exceptions** button in the top-middle of the window. When it turns red, click on the tab(s) and then the field(s) where you want to make the exception(s) and fill in the new value.

- Click **Save** when finished with that patron-item policy combination. Then click on the **Exceptions** button which should then turn yellow. An **Alert** icon will appear on the tab where the exceptions have been made, but you will not be able to see the exception without having that tab in focus and clicking on the **Exceptions** button again. Then the field with the red outline will mean that that is where the exception is and the exceptions value is the one showing.
- Repeat on all patron-item policy combinations until you have made all the exceptions that you want.

Once a policy has been created, it must be assigned to a patron or item in order for it to be of any use. It may be assigned in the **Patrons** or **Items** management windows on a one-by-one basis or from **Circulation** using the **UI** or **UP Circulation commands**, or globally using **Utilities**.

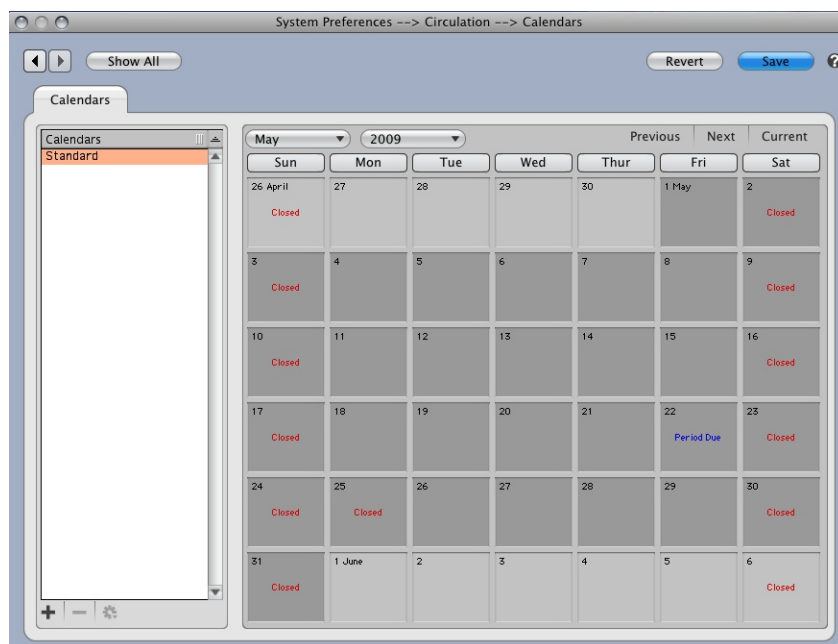
Call Number Policy Mapping preferences allow you to enter the call number range associated with an item policy. Otherwise, Alexandria will not automatically assign policies based upon call number range or medium type to the items as the records are imported. Items are assigned the default policy specified in the **System Preferences** or **Import** window when they are added.

Just to reiterate, if you create a Fiction policy, Alexandria will not put any of the fiction items on that policy unless you have set up the **Call Number Policy Mapping Preferences**. If not, you must either find each fiction title, unlock the title and change the policy yourself, OR choose to replace the policy in **Utilities**, selecting by call numbers starting with FIC, OR go to **Circulation**, type **UI** and press <enter>, select the Fiction policy and scan each copy to change to that policy. Also, running the utility will not apply to future fiction items entered; it only applies to items currently in the data.

To set call number mapping:

- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **Call Number Policy Mapping** in the **System Administration** category.
- Click on the **Add (+)** icon in the bottom-left corner of the window.
- Fill in the **Starting With** and **Ending With** fields with call numbers to represent the range of the call numbers to be assigned to a certain policy
- Fill in the **Library** if you are in a Central Union system.
- Select the appropriate policy from the drop-down menu at the bottom of the window.
- Click on **Save** on the window.
- Repeat until you have set all call number mappings that you want to set.
- Click on **Save** on the **System Preferences** window.

C. Calendars



Calendars govern when items are due. Except for manually set override due dates and overnight checkouts, items cannot be due on a closed day. To close a single day, click once on the day to close. To open a day, click on the day until **Closed** and **Period Due** disappear. To close all the Wednesdays for the month, select the month desired using the drop-down menu (make certain that you are in the right year) and click on the column header Wed. To close all Fridays for the year, go to January of the appropriate year, then hold down the **<alt>** (Windows) or **<alt / option>** (Macintosh) key and click on the column header Fri and answer the question appropriately.

Period Due Dates may be set for the end of the year when all items must be returned. Items will circulate normally until the due date would pass the **Period Due Date**. If the policies state that **Period Due Dates** apply, then the due date will be adjusted to the **Period Due Date**. (This feature may also be used to ensure that most items are returned before major holidays, before inventory season or before a major move.)

Notice that there is a button for creating new calendars. You may specify in the patron policies which calendar to use for each policy. If you have a staff or faculty policy, they may have different open and closed days or need a different **Period Due Date**. When you create a new calendar, choose whether to duplicate the current calendar, and set the dates appropriately. Don't forget to set the corresponding policies to use the correct calendars.

1. **On the Standard Calendar, for next year, close every Saturday and Sunday for the entire year, Labor Day and all of July and August. Set a Period Due Date for the fourth Friday in May.**

To set calendar closed days:

- Go to **Edit** on the menu bar and select **System Preferences**.
- In the **Circulation** category, click on **Calendars**.
- If you have more than one calendar, select the correct one in the left pane.

- To close the same day of the week for the whole year:
 - Change the **Month** drop-down menu to **January** and the **Year** drop-down menu to the desired year.
 - Holding down the **Alt** (Windows) or **Alt/Option** (Macintosh) key, click on the day label at the top of the calendar.
 - When asked if you want to close the day for the rest of the year, click on **Yes**.
- To close consecutive days, **click, hold and drag** from the first date through the last date.
- To close one day, **click once** on the desired date.
- To set a **Period Due Date**, **click twice** on the date.
- To clear a date, **click** through the cycle -- **once** closes the date, **second click** sets a **Period Due Date**, **third click** clears the date.
- Click on **Save** in the upper-right corner of the window to save changes.

D. Circulation Rules, Barcodes

The **Circulation Rules System Preferences** controls how things work in **Circulation**. For instance, on the **User Interaction** tab, you decide if the **Current Patron** and **Current Item**, and **Transaction Log** areas of the **Circulation** window clear on timeout and how many minutes before the timeout takes place. In addition, you decide whether or not patron Lexile and reading levels will be visible and if there will be **Patron Alerts** displayed for overdue items, in-stock holds or upcoming reservations. The **Rules** tab governs such things as renewals, reservations, overdue notices, email notifications and charges. The **Receipts** tab allows you to set rules for printing receipts while the **Letters** tab is the place where you will set the text for the standard notices. **Condition Codes** and **Damage Codes** are set using the tabs designated for these functions.

The **Barcodes System Preferences** are part of the **System Administration** category of the **System Preferences**. Use these tabs to set your preferences governing the type of barcodes and barcode numbers for Alexandria to use.

E. Patrons, Items, z39.50

The **Patrons System Preferences** are part of the **Management** category. Using these preferences, you set whether or not to keep patron history for all patrons and whether or not to disable expiration dates. On the **Grade Table** for this preference group, you enter the grades that are in your school. On the **Management** tab, enter the next barcode for Alexandria to use for patrons if Alexandria is to assign barcodes to patrons.

The **Items management System Preferences** are also part of the **Management** category. Here you set the **Next Barcode** if Alexandria is to assign item barcodes. You will also set the **Default Policy** and **Default Medium** to be used when adding items to your collection. Additional preferences in this group allow you to dictate if the call numbers should all be in upper-case and whether or not to **Enable Add Title Assistant**.

In the **Network Services** category of the **System Preferences**, the **z39.50 Services** preferences are found. The main preference settings in this area are for the **MARC Search** preferences. Here you will set the number of seconds for the search to run, the maximum number of

results, and the types of items (books and/or non-books) that should be returned when using **MARC Search**.

F. Researcher

Use these preferences to allow only those things that you want patrons to be able to do when using Alexandria and whether or not the items checked out to the **System Patrons** should show in **Researcher**.

G. Authority Control

Authority Control allows you to set what information you would like authority-controlled as well as how changes made in the **Authority Control** module should affect your records.

NOTES:

10 Alexandria Quick Start Checklist

For those who have not set up Alexandria, the following is an ordered checklist of what to do in the order you should do these things.

A. Install Alexandria

B. Utilities — Archives and Rebuilds

- a. Set Archives Schedule**
- b. Set Rebuild Schedule**

C. Set System Preferences

- a. Site Information**
- b. Email**
- c. Security**
- d. Operators**
- e. Calendars**
- f. Policies (Patrons, Items, Exceptions) and Call Number Policy Mapping**
- g. Circulation Rules, Barcodes**
- h. Patrons, Grades, Items**
- i. Researcher**

D. Import Patrons

E. Import Items

F. Run Utilities

Remember, you must have your policies established before you can run the utility to change items or patrons to a different policy.

a. Patron utility to put patrons on correct policies

To change patrons to a new policy:

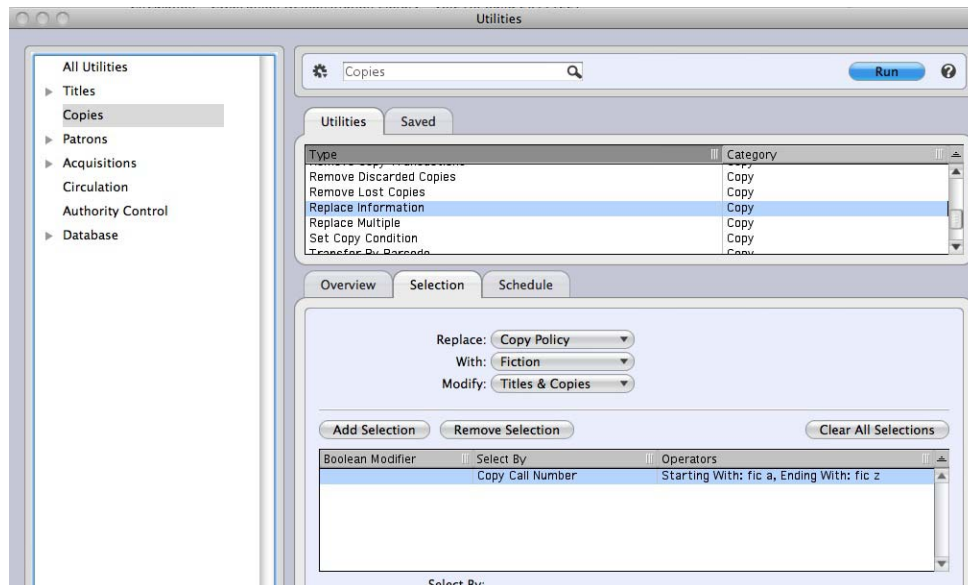
- Go to **Tools** on the menu bar and select **Utilities**.
- Click on the **Patrons** category and, then, click on **Replace Information** in the main (right) frame.
- Set the **Replace** drop-down menu to **Patron Policy**, the **With** drop-down menu to the policy you want used for the selected items.
- Set **Select By** drop-down menu to the desired criteria and fill in the **Starting With** and **Ending With** fields with the appropriate information.
- Click **Run**.

NOTE: Remember, if you are asked whether or not you want to **Archive**, the answer is *always* **Yes**.

b. Item utilities to put items on correct policies

To change items to a new policy:

- Go to **Tools** on the menu bar and select **Utilities**.
- Click on the **Copies** category, then, click on **Replace Information** in the main (right) frame.



- Set the **Replace** drop-down menu to **Copy Policy**, the **With** drop-down menu to the policy you want used for the selected items. Leave the **Modify** drop-down menu set to **Titles and Copies**.
- Set **Select By** drop-down menu to the desired criteria and fill in the **Starting With** and **Ending With** fields with the appropriate information.
- Click **Run**.

NOTE: Remember, if you are asked whether or not you want to **Archive**, the answer is *always* **Yes**.

G. Questions or Problems? — Call Tech Support

Tech Support is available 24 hours a day, 7 days a week, 365 days a year.

Just call 1-800-347-4942.

NOTES: